Provider

User Manual

GEORGIA BABIES CAN'T WAIT

Provider User Manual

Version 1.5

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Welcome

Online Help

Help System Overview

The Georgia Babies Can't Wait help system contains two types of help topics: page-level help topics and tutorial help topics. These page-level help topics contain information about application pages found within the Georgia Babies Can't Wait web application. Each page-level topic describes a specific web page and includes the following information:

- The purpose of the page,
- How to navigate to the page,
- The controls found on the page, and
- The tasks that can be started from the page.

The tasks listed for each web page include links to tutorial help topics. A tutorial help topic contains instructions that walk you through individual tasks, step-by-step.

Preparing to Display Help

The Georgia Babies Can't Wait help system is designed to support a screen resolution of 800x600 pixels, and a High Color (16 bit) color depth. We recommend you display the help system with a screen resolution of 800x600 or better, and a High Color (16 bit) color depth or better. Screen areas less than 800x600 pixels and color schemes less than High Color (16 bit) are not supported by the help system; therefore, displaying the help system at a screen resolution of 640x480 pixels or less, or at a color depth of 256 colors or less, is not recommended. For more information on how to change your computer's screen resolution and color depth, refer to your operating system's help files.

Displaying Help

Panel-level and tutorial help topics display in this content pane of the help system. Within the application, the help system is displayed by clicking the **Online Help** menu option on the **Help** menu available on the Georgia Babies Can't Wait application's menu bar, just as you did to display this help system overview. Specific help topics can be accessed through help system's table of contents, index, or search functions. For your convenience, the help system also includes a glossary of terms that contains definitions of the terms most commonly used within the application and this help system.

Navigating Help

Within the help system, navigation buttons are displayed in the pane along the top of your browser window. The contents, index, glossary, and search functions are displayed in a pane on the left side of your browser window when clicked. The following list describes each of the navigation buttons:

- Click the **Contents** button to access the help system's table of contents.
- Click the **Index** button to access the help system's index.
- Click the **Search** button to access the help system's search function.
- Click the **Glossary** button to access the help system's glossary of terms.

To navigate to a previously displayed help topic, click your browser's **Back** button. For more information on navigating web pages, refer to your browser's help file. To print the currently displayed help topic, click your browser's **Print** button. For more information on printing web pages, refer to your browser's help file.

See the following topic(s) for more information:

- Tutorial: Find a Help Topic

Tutorial: Find a Help Topic

Use this tutorial to find a help topic quickly and easily within the Georgia Babies Can't Wait help system. Listed below are four unique ways of locating a help topic. Use the method that you find most useful.

NOTE: For more information about the help system, see the Help System Overview topic.

Complete the following steps to find a help topic using the table of contents:

1. Click the **Contents** button to display the help system's table of contents pane on the left side of your browser window.
2. Browse through the help topics, which are displayed by category.
3. Click a book to open it and display the help topics contained within it.
4. Click a page to display the contents of the selected help topic.

Complete the following steps to find a help topic using the index:

1. Click the **Index** button to display the help system's index pane on the left side of your browser window.
2. Browse through the keywords, which are listed alphabetically.

   OR

   Type a keyword or phrase in the text box to highlight a specific help topic. You can enter partial information to narrow the results displayed.
3. Click a keyword in the index to display the help topic.

Complete the following steps to find a help topic using the search function:

1. Click the **Search** button to display the help system's search pane on the left side of your browser window.
2. Type a keyword or phrase in the text box.
3. Click the **GO** button to begin the search.
4. Browse through the list of returned topics, which are sorted alphabetically.
5. Click a topic in the list to display a selected help topic.

NOTE: When you find the help topic you seek using one of the methods listed above, you can click the **X** button to hide the help system's left navigation pane.

Calendar Controls

In the Georgia Babies Can't Wait application, calendar controls allow you to enter or select dates from a drop-down calendar. Click on a date field to display the drop-down calendar, and then click on a date to select it. You can navigate through the months using the arrow buttons at the top of the calendar.

The calendar control appears as a masked edit box. However, a one-month calendar displays when your cursor is placed in the masked edit box. The month that the calendar displays is determined by the contents of the masked edit box. If the box is empty, the current month displays. If the box contains a date, the specified month displays.

Calendar control (day view)

The left arrow ◂ at the top-left corner of the calendar displays the previous month when clicked. The right arrow ▸ at the top-right corner of the calendar displays the next month when clicked. Any day of the displayed calendar month can be selected by clicking it. Alternately, the current date can be selected by clicking the Today link at the bottom of the calendar.

Click the Month, Year link at the top of the calendar to display all months in the year. The left arrow ◂ at the top-left corner of the calendar displays the previous year when clicked. The right arrow ▸ at the top-right corner of the calendar displays the next year when clicked. Any month of the displayed calendar year can be selected by clicking it. Once selected, the day view will be displayed.

Calendar control (month view)

Click the Year link at the top of the calendar to display all years in the decade. The left arrow ◂ at the top-left corner of the calendar displays the previous decade when clicked. The right arrow ▸ at the top-right corner of the calendar displays the next decade when clicked. Any year of the displayed decade can be selected by clicking it. Once selected, the month view will be displayed.

Calendar control (year view)

If you prefer not to use the mouse, a date can be typed directly in the box. The date entered can be in one of several different formats, but it must be valid. For example, you could type any of the following:

- "08 10 08"
- "08/10/08"
- "8/10/2008"

Any of the dates above would be recognized by the calendar control and displayed as "8/10/2008". The values typed can be separated by forward slashes (/).

Tables

Throughout the Georgia Babies Can't Wait application, tables containing search results and record lists display on various pages. When a table of data is available, you can click a column heading to sort the data in the table in ascending order by the selected column. Once selected, you can click the column heading again to sort the data in descending order.

At the bottom right of the table, you can view the total number of records contained within the table. When more than one page of records is available, you can click the following buttons at the bottom left of the table to navigate through the various pages:

Click to display the first page of records.

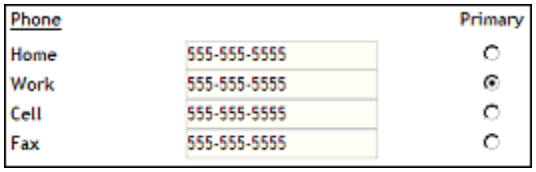
Click to display the previous page of records.

Click to display the next page of records.

Click to display the last page of records.

Telephone Numbers

The Georgia Babies Can't Wait application allows you to record primary and alternate telephone numbers for better record-keeping. Telephone numbers are initially expanded. Click the **Phone** link to collapse the telephone number fields.



Phone link (expanded view)

You can enter the 10-digit home, work, cell, and fax telephone numbers as necessary. Telephone numbers entered cannot begin with the following prefixes: 000, 911, 999, 900, and 555.

NOTE: Depending on the page displayed, some telephone number fields may not be available.

One telephone number must be designated as the primary contact number. To designate the primary telephone number, select the **Primary** radio button to the right of the appropriate telephone number field. Only one telephone number is required.

You can click the **Phone** link to collapse the available telephone number fields. When collapsed, only the telephone number designated as the primary displays.

Phone link (collapsed view)

Home

The Home Page

Home

This page allows you to quickly access and perform tasks within the Georgia Babies Can't Wait application.

To access this page, complete the following steps:
The Home page is the first page that displays when the Georgia Babies Can't Wait application is initially accessed via your web browser. Once the application is accessed, you can navigate to the Home page at any time by selecting the **Home** menu option on the **Home** menu.
The Home page displays differently when you are logged into the Georgia Babies Can't Wait application.

BABIES CAN'T WAIT
HOME OF GEORGIA'S EARLY INTERVENTION SYSTEM
User Name
Password
Login
Forgot Password?
HOME
Welcome to the Georgia Babies Can't Wait website. Babies Can't Wait (BCW) is Georgia's statewide interagency service delivery system for infants and toddlers with developmental delays or disabilities and their families. BCW is established by Part C of the Individuals with Disabilities Education Act (IDEA) which guarantees all eligible children, regardless of their disability, access to services that will enhance their development.
Babies Can't Wait
Babies Can't Wait (BCW) is Georgia's statewide interagency service delivery system for infants and toddlers with developmental delays or disabilities and their families.
404-657-4855
http://health.state.ga.us/programs/bcw/index.asp
Children 1st
The mission of Children 1st is to identify children who are at risk for poor health and developmental outcomes, so that needed interventions can be made to ensure the optimal health and development of the child.
404-656-6679
http://health.state.ga.us/ programs/childrenfirst/index.asp
Children's Medical Services
Children 1st is the "Single Point of Entry" to a statewide collaborative system of public health and other prevention based programs and services. This system helps parents provide their young children with a healthy start in life.
404-657-4855
http://health.state.ga.us/ programs/cms/index.asp
Universal Newborn Hearing Screening and Intervention
404-657-4143
http://health.state.ga.us/ programs/unhs/index.asp
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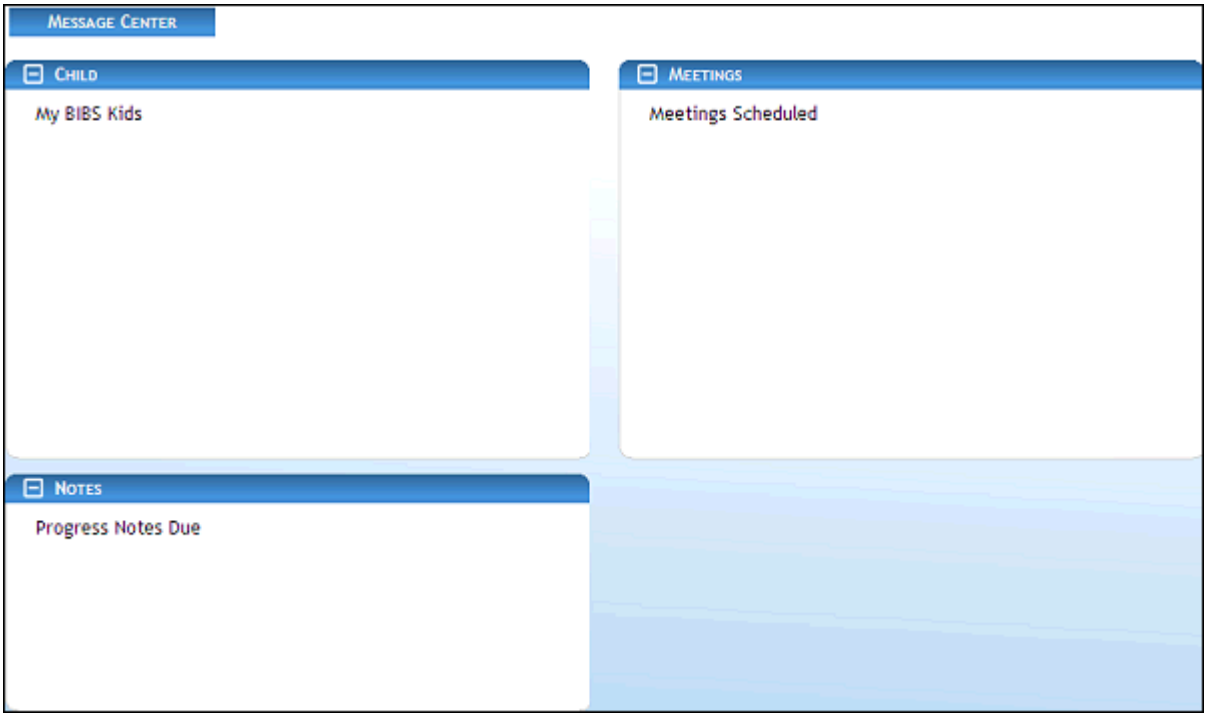
Home page (default view)

Logging In

To log in to the Georgia Babies Can't Wait application, enter your **User Name** and **Password** in the fields at the top right of the Home page and press **Enter**.



Home page (logged in user)

If you have forgotten your password, click the **Forgot Password** link.

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Once you are logged into the Georgia Babies Can't Wait application, you can access the help system. For more information about the help system, see the Help System Overview topic.

Accessing Information on the Home page

The Home page provides shortcuts to commonly used tasks and specialized child lists throughout the application.

See the following topic(s) for more information:

- Tutorial: Access the Home Page

Before you log into the application, you can complete the following tasks on the Home page:

- Tutorial: View a List of District Locations for Your State
- Tutorial: View Resources for Your Program

After you log into the application, you can complete the following tasks on the Home page:

- Tutorial: Find a Help Topic
- Tutorial: View a List of Meetings Scheduled for Children
- Tutorial: View a List of My BIBS Kids
- Tutorial: View Messages and Update Message Preferences

Tutorial: Access the Home Page

Use this tutorial to access the Home page of the Georgia Babies Can't Wait application.

Complete the following steps to perform this tutorial while logged out of the application:

1. Launch the Georgia Babies Can't Wait application. The Home page displays.

BABIES CAN'T WAIT
HOME OF GEORGIA'S EARLY INTERVENTION SYSTEM
User Name
Password
Login
Forgot Password?
HOME
Welcome to the Georgia Babies Can't Wait website. Babies Can't Wait (BCW) is Georgia's statewide interagency service delivery system for infants and toddlers with developmental delays or disabilities and their families. BCW is established by Part C of the Individuals with Disabilities Education Act (IDEA) which guarantees all eligible children, regardless of their disability, access to services that will enhance their development.
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Children's Medical Services
Children 1st is the "Single Point of Entry" to a statewide collaborative system of public health and other prevention based programs and services. This system helps parents provide their young children with a healthy start in life.
404-657-4855
http://health.state.ga.us/ programs/cms/index.asp
Universal Newborn Hearing Screening and Intervention
404-657-4143
http://health.state.ga.us/ programs/unhs/index.asp
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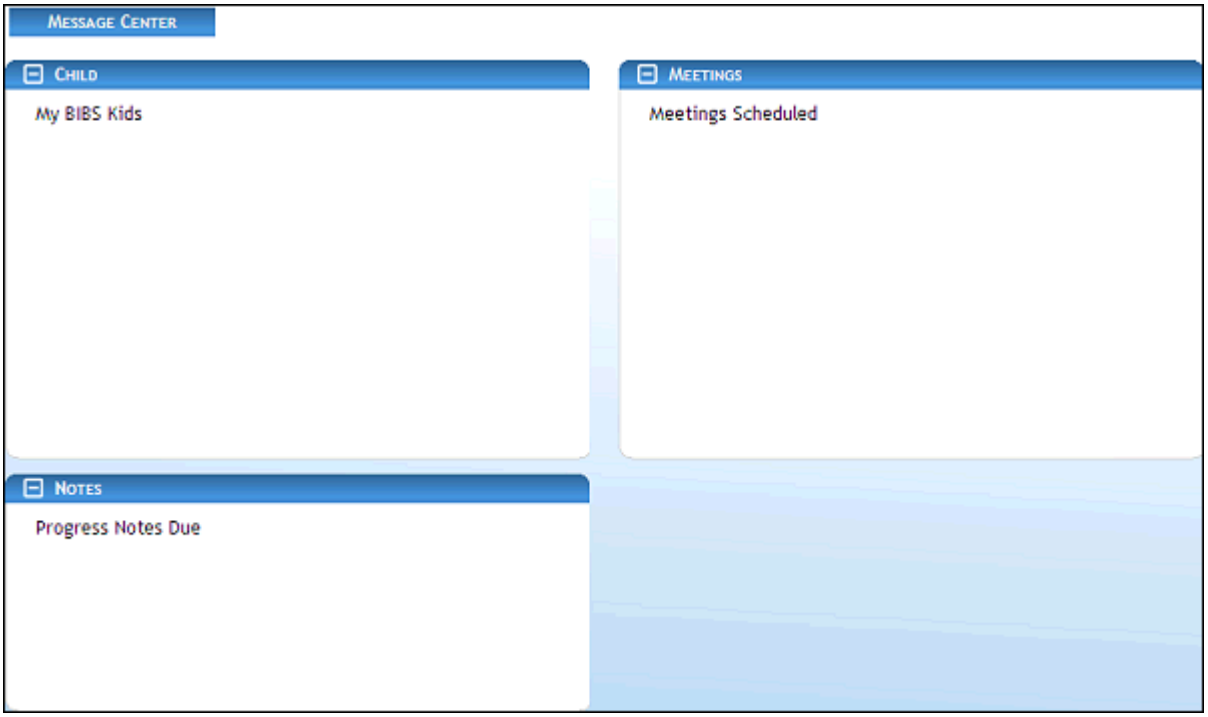
Home page (default view)

Complete the following step to perform this tutorial while logged into the application:

1. Click the **Home** link on the top menu bar. The Home page displays when clicked.



Home page (logged in user)

Tutorial: View Resources for Your Program

Use this tutorial to access resources for your program from the Home page.

NOTE: This tutorial can only be performed when you are logged out of the Georgia Babies Can't Wait system.

Complete the following steps to perform this tutorial:

1. If you are currently logged into the Georgia Babies Can't Wait system, select the **Logout** link at the top left of the page. You are logged out of the system and the Home page displays.

BABIES CAN'T WAIT
HOME OF GEORGIA'S EARLY INTERVENTION SYSTEM
User Name
Password
Login
Forgot Password?
HOME
Welcome to the Georgia Babies Can't Wait website. Babies Can't Wait (BCW) is Georgia's statewide interagency service delivery system for infants and toddlers with developmental delays or disabilities and their families. BCW is established by Part C of the Individuals with Disabilities Education Act (IDEA) which guarantees all eligible children, regardless of their disability, access to services that will enhance their development.
Babies Can't Wait
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http://health.state.ga.us/ programs/cms/index.asp
Universal Newborn Hearing Screening and Intervention
404-657-4143
http://health.state.ga.us/ programs/unhs/index.asp
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Home page (default view)

2. Click the following links in the **Resources** section to view a resource for your program in a new browser window:
   - The **Babies Can't Wait** section contains a link to program information on the statewide interagency service delivery system for infants and toddlers with developmental delays or disabilities and their families.

     http://health.state.ga.us/programs/bcw/index.asp
   - The **Children 1st** section contains a link to program information used to identify children who are at risk for poor health and development outcomes so that needed interventions can be made to ensure the optimal health and development of the child.

     http://health.state.ga.us/programs/childrenfirst/index.asp
   - The **Children's Medical Services** section contains a link to a program used as a single point of entry to a statewide collaborative system of public health and other prevention based programs and services.

     http://health.state.ga.us/programs/cms/index.asp

- The **Universal Newborn Hearing Screening and Intervention** section contains a link to a program used to develop and sustain a comprehensive coordinated system for universal newborn hearing screening and intervention.

  http://health.state.ga.us/programs/unhs/index.asp
- The **Parent to Parent of Georgia** section contains a link to a program used to provide support and information services, training, and leadership opportunities for families who have children and youth with disabilities.

  http://p2pga.org/
- The **Women, Infants and Children** section contains a link to a program in service of women, infants, and children in families with income at or below 185% of the federal poverty level or enrolled in Medicaid; and who are at risk for nutritional deficiencies.

  http://health.state.ga.us/programs/wic/
- The **Newborn Screening for Metabolic and Sickle Cell Disorders Program** section contains a link to a program used to screen for some genetic disorders, endocrine conditions, and hearing loss.

  http://www.health.state.ga.us/programs/nsmscd/index.asp
- The **American Academy of Pediatrics** section contains a link to an organization of 60,000 pediatricians committed to the attainment of optimal physical, mental, and social health and well-being for all infants, children, adolescents, and young adults.

  http://www.aap.org/
- The **Governors Council on Disabilities** section contains a link to a program promoting public policy that creates an integrated community life for persons with developmental disabilities, their families, friends, neighbors, and all who support them.

  http://www.gcdd.org/
- The **Georgia Dental Association** section contains a link to the premier professional dental organization in the state dedicated to promoting and upholding the highest standards of dentistry and patient care for all Georgians through education, advocacy, and professionalism.

  http://www.gadental.org
- The **Georgia Department of Early Care and Learning** section contains a link to a program responsible for meeting the child care and early education needs of Georgia's children and their families.

  http://www.decal.ga.gov
- The **Division of Family and Children Services (DFCS)** section contains a link to the governmental office of DHS that investigates child abuse, finds foster homes for abused and neglected children, helps low income and out-of-work parents get back on their feet, assists with childcare costs for low income parents who are working or in job training, and provides numerous support services and innovative programs to help troubled families.

  http://www.dfcs.dhr.georgia.gov
- The **Georgia Department of Behavioral Health & Developmental Disabilities (DBHDD)** section contains a link to a program providing treatment and support services to people with mental illnesses and addictive diseases, and support to people with mental retardation and related developmental disabilities.

  http://dbhdd.georgia.gov/portal/site/DBHDD/
- The **Energy Assistance, Section 8 Housing, Food Stamps** section contains a link to a program that pays for some home heating and cooling costs for low income eligible families including crisis.

  http://www.team.georgia.gov/portal/site/DHS-DFCS/

- The **Katie Beckett Deeming Waiver** section contains a link to the Deeming Waiver, providing ways for parents to get Medicaid for their child with a disability when their income is too high to qualify for Supplemental Security Income (SSI).

  http://p2pga.org/roadmap/insurance/insurancedeemingcover.htm

- The **SSI/Medicaid** section contains a link to the governmental program that makes monthly payments to people with low income and limited resources who are 65 or older, or blind or disabled.

  http://www.ssa.gov/pubs/10026.html

- The **Office of Commissioner of Insurance** section contains a link to a program designed to build a well-trained workforce, utilizing state of the art technology to facilitate regulation, coordination, and uniformity among state regulators and provide public access to services and fire safety information that results in a consumer friendly and competitive market place.

  http://www.gainsurance.org/

- The **Department of Education Parent Mentors** section contains a link to a program that builds effective family, school, and community partnerships that lead to greater achievement for students, especially those with disabilities.

  http://www.parentmentors.org/

- The **Peachcare for Kids** section contains a link to a program that provides comprehensive health care to children through the age of 18 who do not qualify for Medicaid and live in households with income at or below 235% of the federal poverty level.

  http://www.peachcare.org

- The **Injury Prevention** section contains a link to a program that provides injury prevention by empowering state and local coalitions through the provision of data, training, and leadership, and the leveraging of resources for prevention programs.

  http://health.state.ga.us/programs/injuryprevention/

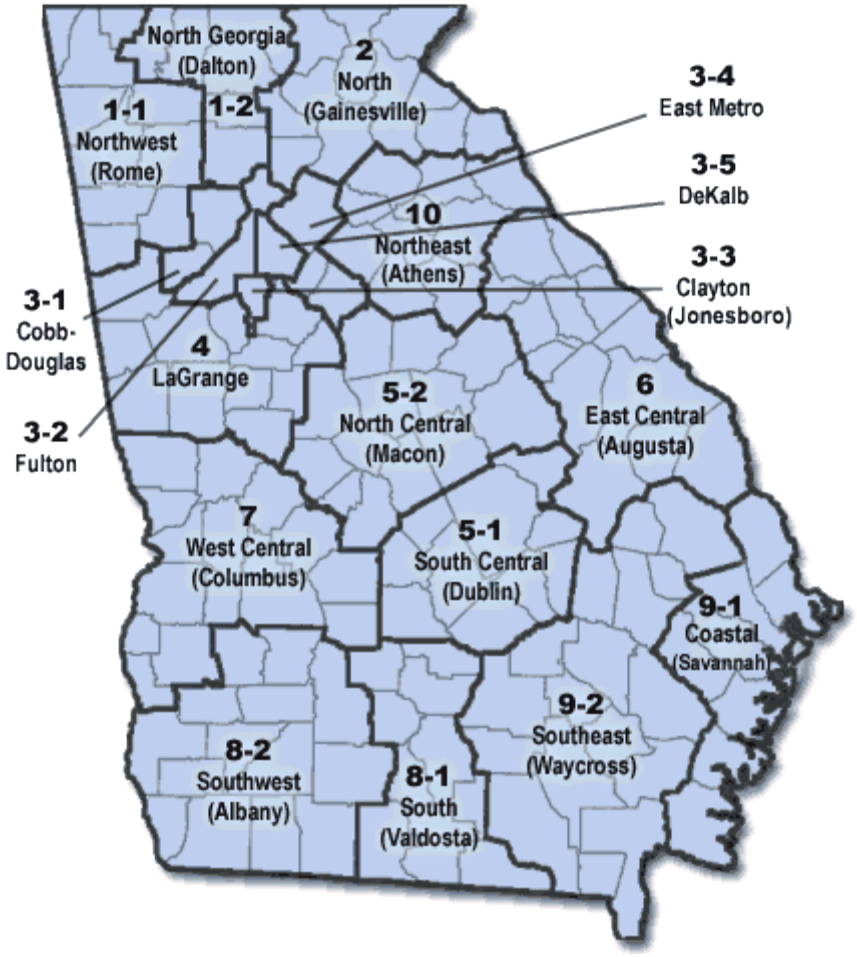
District Locations

District Locations

This page allows you to view a map identifying all of the district locations for your state.

To access this page, complete the following steps:
On the main menu bar:

- On the **Home** menu, select the **District Locations** menu option.



District Locations page (default view)

Viewing District Locations

Use this page to view a list of available reports and generate reports.

See the following topic(s) for more information:

- Tutorial: View a List of District Locations for Your State

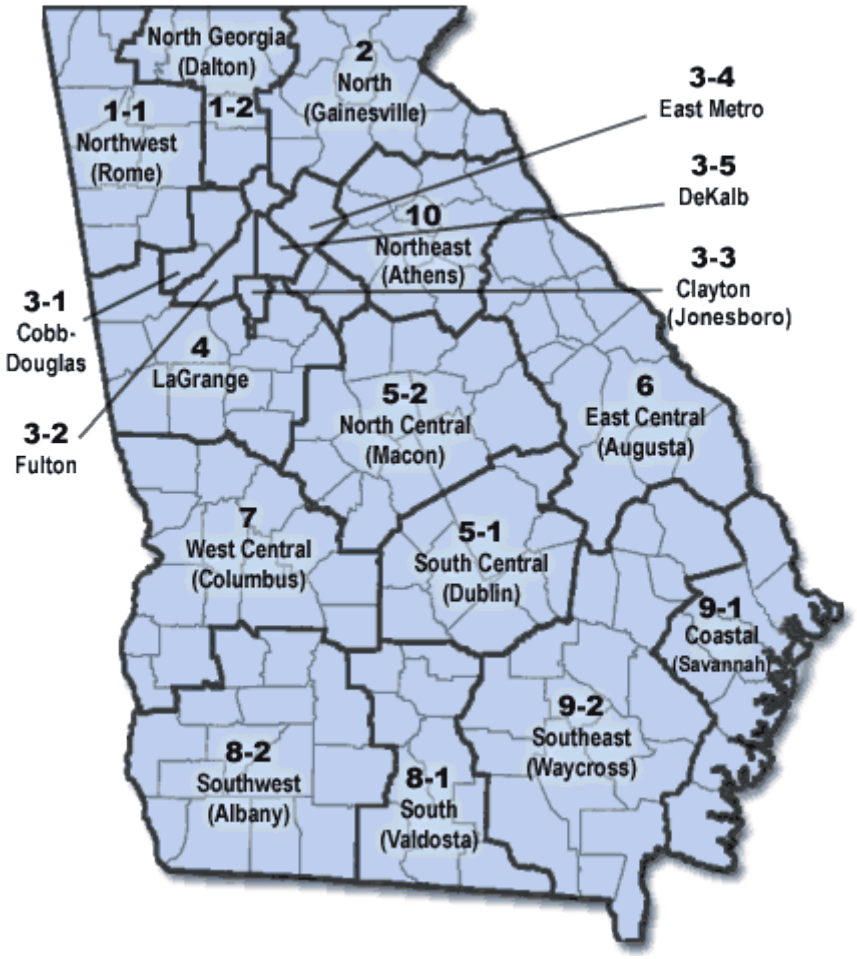
Tutorial: View a List of District Locations for Your State

Use this tutorial to view a list of District locations for your state.

NOTE: This tutorial can be performed when you are logged out of the Georgia Babies Can't Wait system or when you are logged in and have adequate permissions.

Complete the following steps to perform this tutorial:

1. On the **Home** menu, select the **District Locations** menu option. The District Locations page displays a map identifying all of the District locations for your state.



District Locations page (default view)

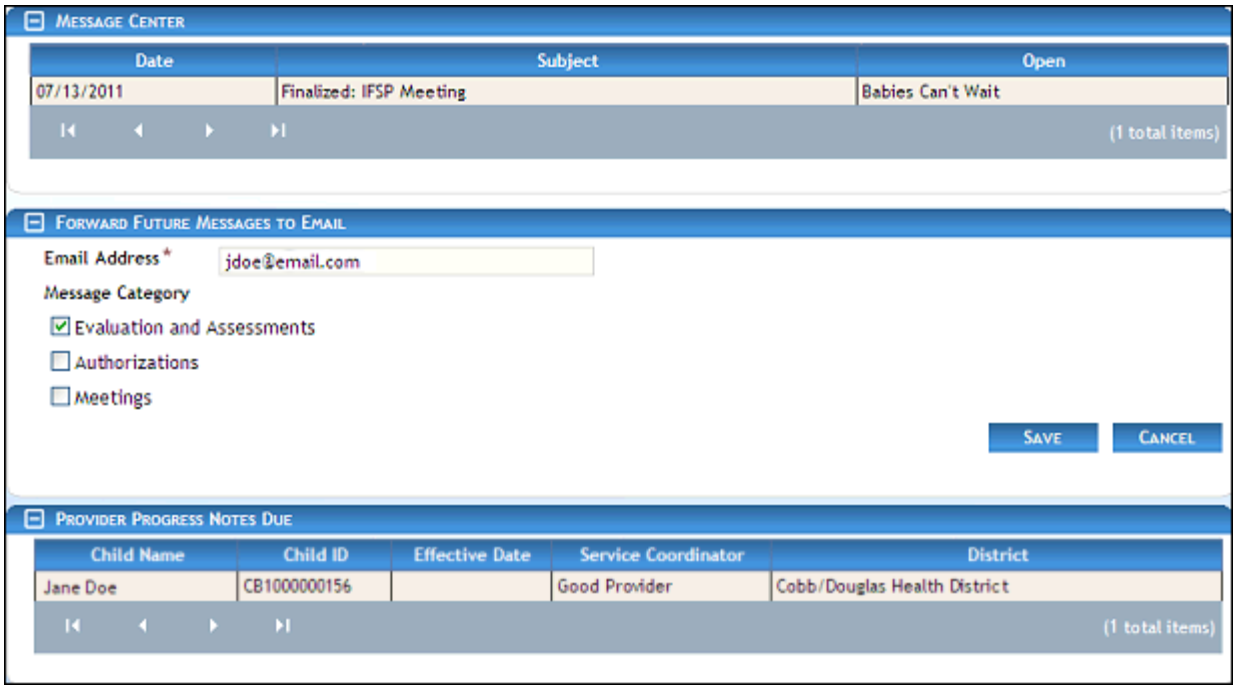
Message Center

Message Center

This page allows you to view a list of system-generated messages and notifications that have been sent to you and to display detailed information for a specific message such as the message subject and date received. You can also update your message preferences on this page as necessary.

To access this page, complete the following steps:

- Display the Home page.
- Click the **Message Center** button.



Message Center page (default view)

Viewing Your Messages

You can double-click on a message displayed or update your message preferences as necessary.

See the following topic(s) for more information:

- Tutorial: View Messages and Update Message Preferences

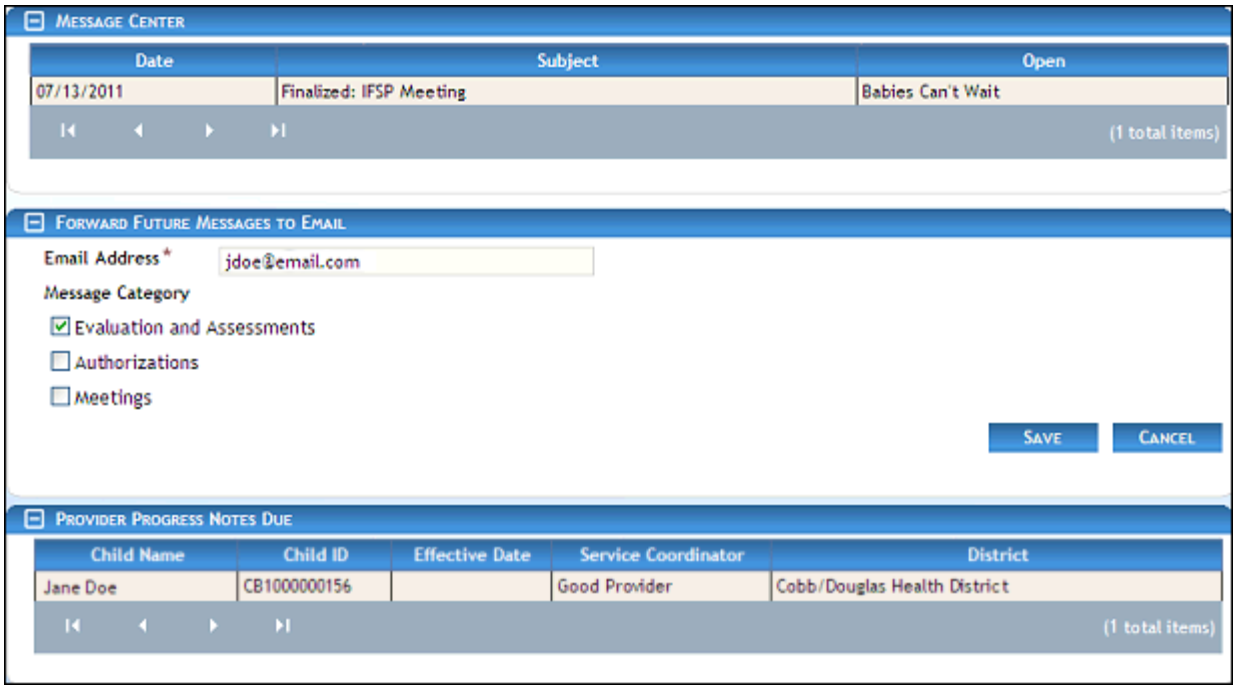
Tutorial: View Messages and Update Message Preferences

Use this tutorial to view a list of all system-generated messages or notifications that have been sent to you, to view detailed information for a specific message, or to update your message preferences on the Message Center page.

NOTE: Depending on the method of access and your current permissions, this tutorial may not be available.

Complete the following steps to perform this tutorial:

1. Display the Message Center page.



Message Center page (default view)

2. View the list of messages and notifications in the **Message Center** table.

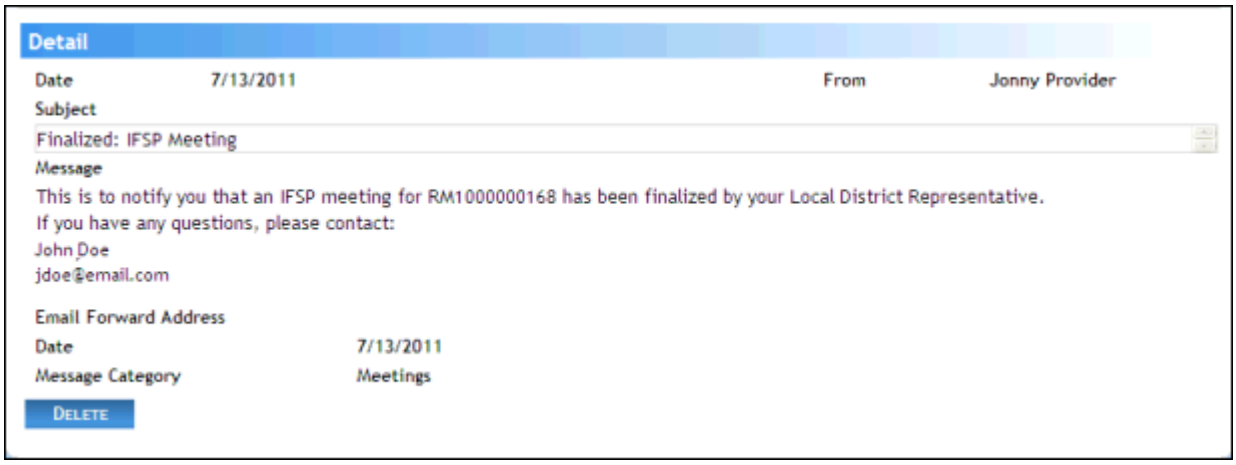
   The table contains a list of all system-generated messages or notifications that have been sent to you. Detailed information about the messages displays in the following columns of the table:

   - **Date** displays the date on which the system-generated message or notification was generated.
   - **Subject** displays the subject of (or reason for) the message or notification.
   - **Open** displays the system that generated the message or notification.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Double-click on a message or notification in the table. The page refreshes and displays detailed information below the table.



Message Center page (details view)

4. View the message or notification details as follows:
   - **Date** displays the date on which the system-generated message or notification was generated.
   - **From** displays the name of the person that generated the message or notification.
   - **Subject** displays the subject of (or reason for) the message or notification.
   - **Message** displays the descriptive text of the message or notification.
   - **Email Forward Address** displays the email address to which future messages will be forwarded (if one exists).
   - **Date** displays the date on which the system-generated message or notification was generated.
   - **Message Category** indicates whether the category is Evaluation and Assessments, Authorizations, or Meetings.

   The data in this section of the page is read-only.
5. Click the **Delete** button to delete the message. The message will no longer display in the table.
6. View or update your message preferences in the **Forward Future Messages to Email** section as necessary:
   - In **Email Address**, enter the electronic mail address to which your messages or notifications should be sent. Email addresses must be entered in the format of: name@xxx.zzz. At least 10 characters must be entered, and you can enter up to 50 characters as necessary.
   - Select the **Evaluation and Assessments** check box to send all system-generated messages and notifications related to evaluation and assessments to the specified email address.
   - Select the **Authorizations** check box to send all system-generated messages and notifications related to authorizations to the specified email address.
   - Select the **Meetings** check box to send all system-generated messages and notifications related to meetings to the specified email address.

7. View the list of children with progress notes due in the **Provider Progress Notes Due** table. Detailed information about the children displays in the following columns of the table:
    - **Child Name** displays the child's first and last name.
    - **Child ID** displays the child's unique identification number.
    - **Effective Date** displays the date on which the item becomes (or became) active or assigned.
    - **Service Coordinator** displays the service coordinator's first and last name.
    - **District** displays the person's district name and number.
8. Click the **Save** button.

My BIBS Kids

My BIBS Kids

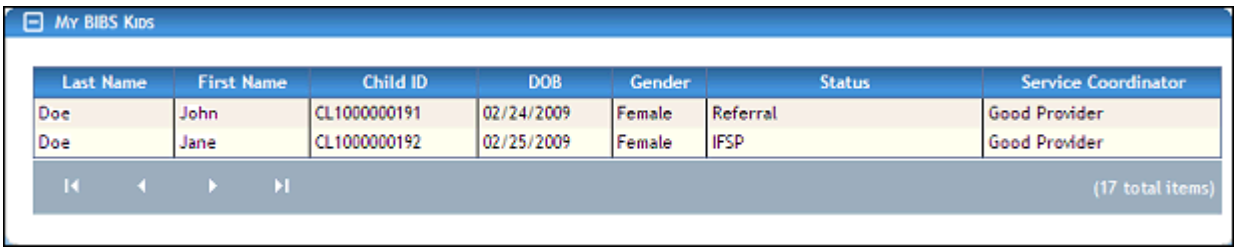
This page allows you to view a list of child records currently assigned to you.

To access this page, complete the following steps:
On the main menu bar:

- On the **Child Care Management** menu, select the **My BIBS Kids** menu option.

On the Home page:

- Display the Home page.
- In the **Child** section, select the **My BIBS Kids** link.



My BIBS Kids page (default view)

Viewing Child Records

You can view the list of applicable child records as necessary.

See the following topic(s) for more information:

- Tutorial: View a List of My BIBS Kids

Tutorial: View a List of My BIBS Kids

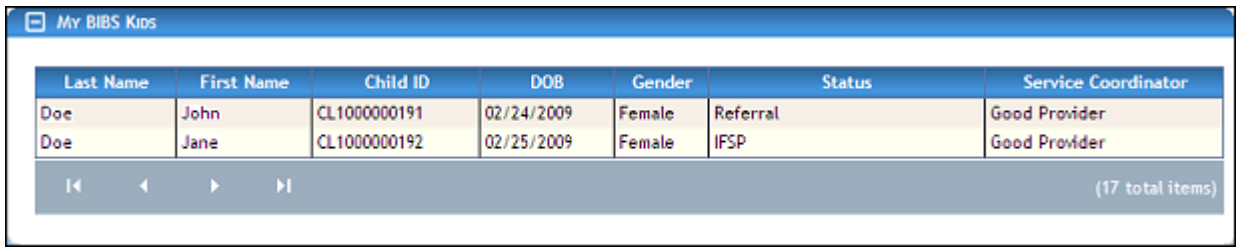
Use this tutorial to view the list of child records on the My BIBS Kids page.

NOTE: Depending on the method of access and your current permissions, this tutorial may not be available.

Complete the following steps to perform this tutorial:

1. Display the My BIBS Kids page.

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.



My BIBS Kids page (default view)

2. View the list of child records in the **My BIBS Kids** table.

   The table contains a list of all child records applicable. Detailed information about the children displays in the following columns of the table:

   - **Last Name** displays the person's last name.
   - **First Name** displays the person's first name.
   - **Child ID** displays the child's unique identification number.
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **Gender** displays the person's sex.
   - **Status** indicates whether the individual is currently active or inactive.
   - **Service Coordinator** displays the service coordinator's first and last name.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

You can double-click on a child record in the table to display the Child Detail page. For more information, see the Tutorial: View Child Details tutorial.

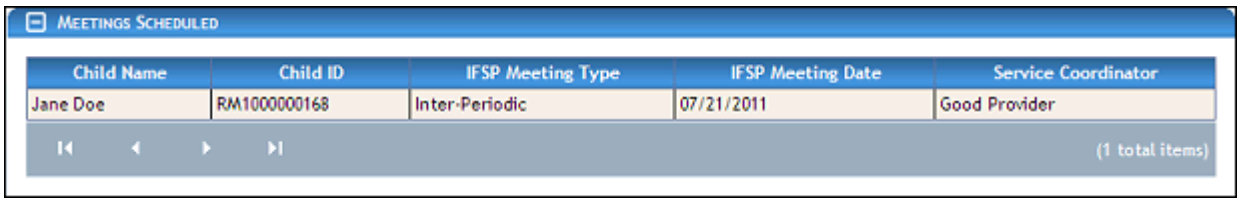
Meetings Scheduled

Meetings Scheduled

This page allows you to view a list of meetings that have been scheduled for children.

To access this page, complete the following steps:

- Display the Home page.
- In the **Meetings** section, select the **Meetings Scheduled** link.



Meetings Scheduled page (default view)

Viewing Child Records

You can view the list of applicable child records as necessary.

See the following topic(s) for more information:

- Tutorial: View a List of Meetings Scheduled for Children

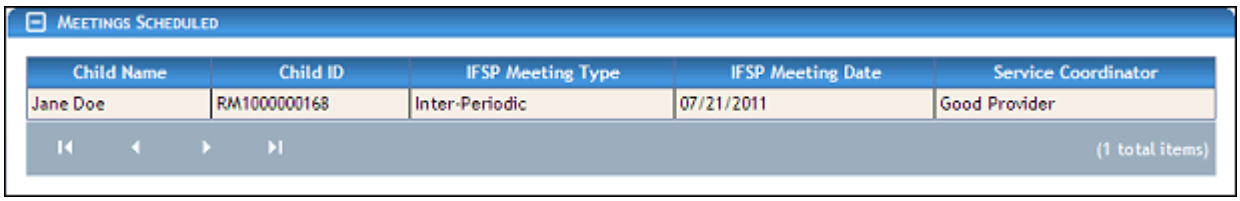
Tutorial: View a List of Meetings Scheduled for Children

Use this tutorial to view the list of meetings that have been scheduled for children on the Meetings Scheduled page.

NOTE: Depending on the method of access and your current permissions, this tutorial may not be available.

Complete the following steps to perform this tutorial:

1. Display the Meetings Scheduled page.



Meetings Scheduled page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. View the list of child records in the **Meetings Scheduled** table.

   The table contains a list of all child records applicable. Detailed information about the children displays in the following columns of the table:

   - **Child Name** displays the child's first and last name.
   - **Child ID** displays the child's unique identification number.
   - **IFSP Meeting Type** displays the meeting type (Initial, Annual Review, 6-Month Review, Inter-Periodic, etc.).
   - **IFSP Meeting Date** displays the date on which the meeting is scheduled or occurred.
   - **Service Coordinator** displays the service coordinator's first and last name.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

You can double-click on a child record in the table to display the IFSP Meetings page. For more information, see the Tutorial: View a List of IFSP Meetings for a Child tutorial.

Progress Notes Due

Progress Notes Due

This page allows you to view a list of children that currently need progress notes.

To access this page, complete the following steps:

- Display the Home page.
- In the **Notes** section, select the **Progress Notes Due** link.

Progress Notes Due (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Viewing Child Records

You can view the list of applicable child records as necessary.

See the following topic(s) for more information:

- Tutorial: View a List of Children with Progress Notes Due

Tutorial: View a List of Children with Progress Notes Due

Use this tutorial to view the list of children that currently need progress notes on the Progress Notes Due page.

NOTE: Depending on the method of access and your current permissions, this tutorial may not be available.

Complete the following steps to perform this tutorial:

1. Display the Progress Notes Due page.

Progress Notes Due (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. View the list of child records in the **Provider Progress Notes Due** table.

   The table contains a list of all child records applicable. Detailed information about the children displays in the following columns of the table:

   - **Child Name** displays the child's first and last name.
   - **Child ID** displays the child's unique identification number.
   - **Provider Name** displays the name of the service provider.
   - **Effective Date** displays the date on which the item becomes (or became) active or assigned.
   - **Service Coordinator** displays the service coordinator's first and last name.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

You can double-click on a child record in the table to display the Progress Notes page. For more information, see the Tutorial: View or Print a List of Progress Notes for a Child tutorial.

Search

Child Search

Child Search

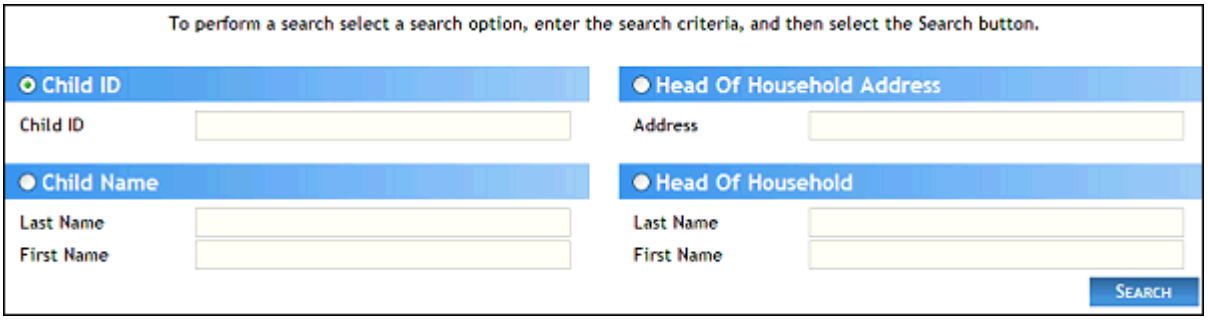
This page allows you to enter information such as a child ID, child name, head of household address, or head of household name to search for a child, and, depending on how this page is displayed, select a child record for which to add to attach an unattached referral.

To access this page, complete the following steps:
On the main menu bar:

- On the **Child Care Management** menu, select the **Child Search** menu option.

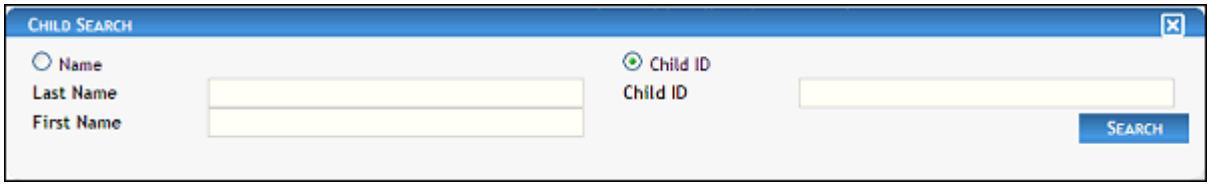
On the Unattached Referrals page:

- Enter search criteria and click **Search**. The **Unattached Referrals** table displays.
- Double-click on a child record in the table.
- Click the **Child ID** link.



Child Search page (default view)

Depending on how the page is called, it may display as a popup on an existing page and contain limited search functionality.



Child Search page (default popup view)

Searching for Children

You can enter information in one or more of the fields on this page to search for children and view detailed child information.

See the following topic(s) for more information:

- Tutorial: Search for a Child

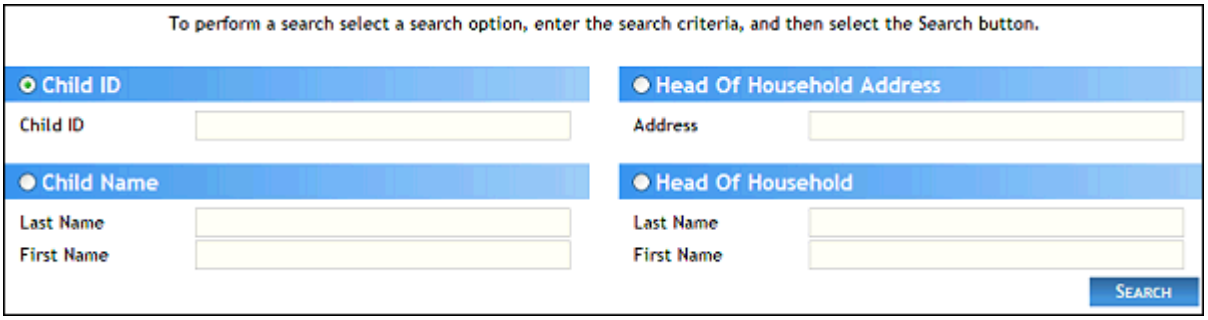
- Tutorial: Search for Unattached Referrals and Attach an Unattached Referral to a Child Record

Tutorial: Search for a Child

Use this tutorial to enter information such as a child ID, child name, head of household address, or head of household name to search for a child on the Child Search page.

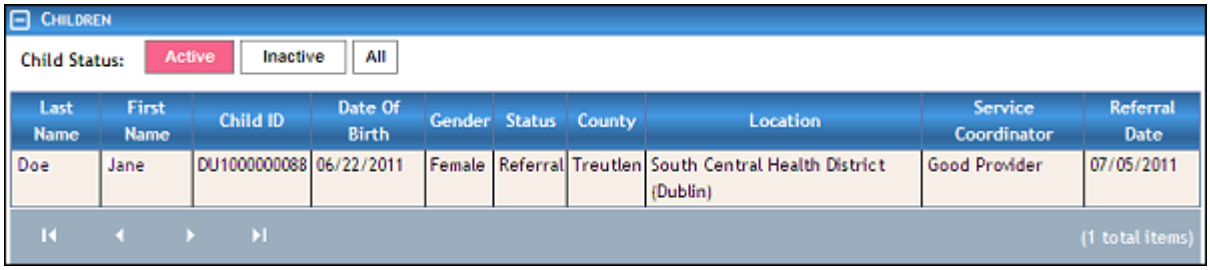
Complete the following steps to perform this tutorial:

1. Display the Child Search page.



Child Search page (default view)

2. Complete information in one or more of the following fields in the **Child ID** and **Child Name** sections to perform a search by child:
   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
3. Complete information in one or more of the following fields in the **Head of Household Address** and **Head of Household** sections to perform a search by head of household:
   - In **Address**, enter the street address on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 100 characters as necessary.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
4. Click **Search**. The page refreshes and results found to match the search criteria display in the results table.



Child Search page (results found)

When **Search** is clicked, results found to match the search criteria specified are displayed in the following column(s) of the table:

- **Last Name** displays the person's last name.
- **First Name** displays the person's first name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Gender** displays the person's sex.
- **Status** indicates whether the individual is currently active or inactive.
- **County** displays the name of the county in which the person resides (or practices).
- **Location** displays the name of the District location.
- **Service Coordinator** displays the service coordinator's first and last name.
- **Referral Date** displays the date on which the referral was first viewed at the EI location.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

5. Filter the results in the table by clicking the following buttons:
   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

NOTE: You can double-click on a record in the table to view detailed information.

Child Detail

Child

Child Detail

This page allows you to view, enter, and update specific data for a child.

To access this page, complete the following steps:
On the main menu bar:

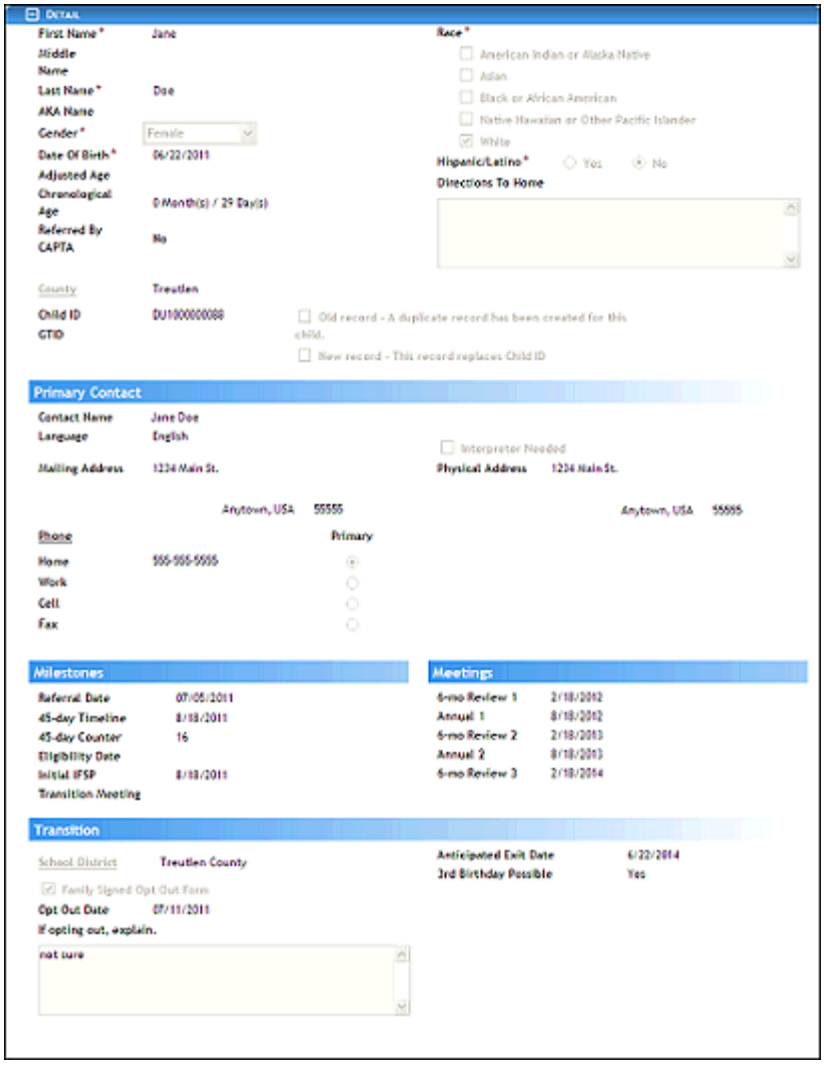
- On the **Child Care Management** menu, select the **Child Search** menu option. The Child Search page displays.
- Enter search criteria and click **Search**. The **Children** table displays.
- Double-click on a child record in the table.

On the Home page:

- In the **Child** section, select the **My BIBS Kids** link. The My BIBS Kids page displays.
- Select filter criteria from the drop-down lists.
- Double-click on a child record in the table.

On the Child Detail page:

- On the **Child Detail** menu, select the **Child** menu option.



Child Detail page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Child Detail Information

You can manage detailed information for children on this page by viewing, editing, and updating data as necessary.

See the following topic(s) for more information:

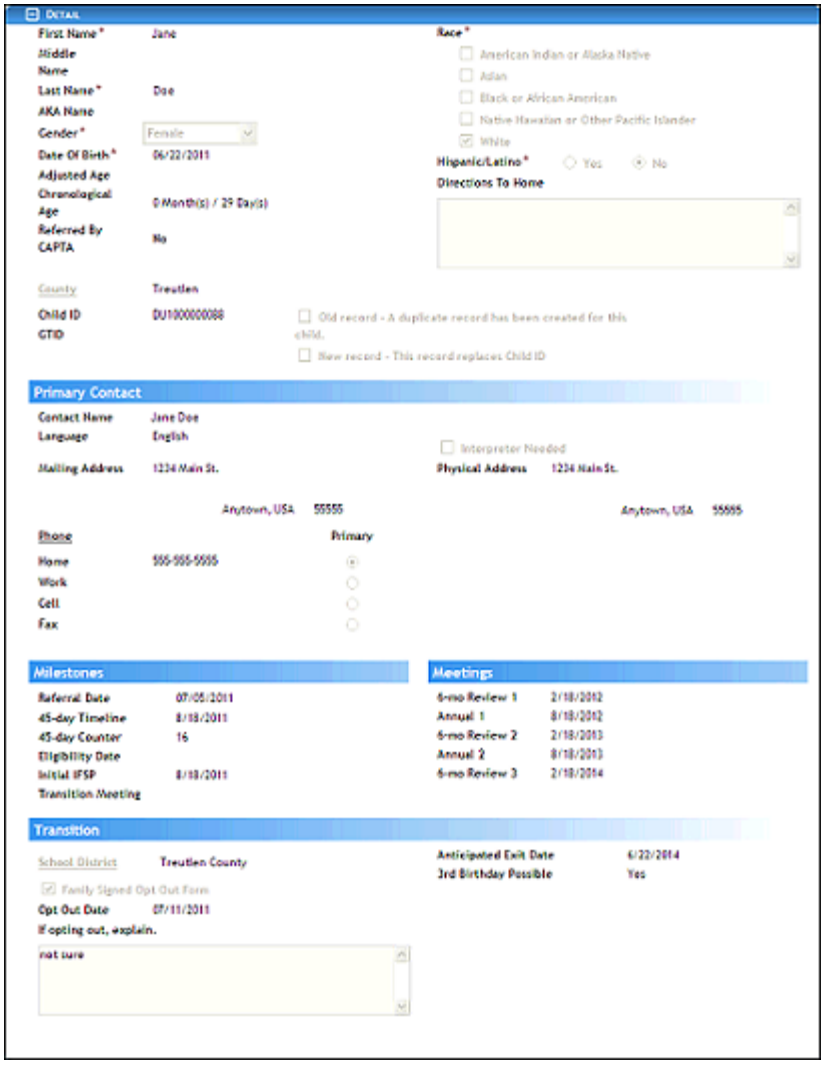
- Tutorial: View a List of Coordinators for a Child
- Tutorial: View a List of Primary Service Providers for a Child
- Tutorial: View a Primary Service Provider's Details
- Tutorial: View a Coordinator's Details
- Tutorial: View Child Details

Tutorial: View Child Details

Use this tutorial to view data on the child's details, primary contact member, milestones, meetings, and transition information displayed in the **Detail** section of the Child Detail page.

Complete the following steps to perform this tutorial:

1. Display the Child Detail page.



Child Detail page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. View the child detail information in the **Detail** section.
   - **First Name** displays the person's first name.
   - **Middle Name** displays the person's middle name.

- **Last Name** displays the person's last name.
- **AKA Name** displays the person's nickname.
- **Gender** displays the person's sex.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Adjusted Age** displays the person's age in weeks up to 1 year.
- **Chronological Age** displays the person's age in months and days as calculated from birth to the current date.
- **Referred by CAPTA** indicates whether the person was referred to Babies Can't Wait by CAPTA.
- **County** displays the name of the county in which the person resides (or practices).
- **Child ID** displays the child's unique identification number.
- **GTID** displays the state-provided identification number.
- **Race** displays the race identified for the person.
- **Hispanic/Latino** displays whether the person's ethnicity is Hispanic or Latino.
- **Directions to Home** displays the directions to the person's home.
- The **Duplicate Child** check box indicates whether the child record is the duplicate of another record.
- The **Duplicate Of** check box and text box identifies the Child ID of the duplicate record.

3. View the child's primary contact person.

   The **Primary Contact** section displays the name of the child's primary contact person, and includes the following details:

   - **Contact Name** displays the first and last name of the contact person.
   - **Language** displays the person's primary language.
   - **Interpreter Needed** indicates whether an interpreter is needed for verbal communication.
   - **Mailing Address** displays the street address, city, two-letter state abbreviation, and zip code at which the person receives mail.
   - **Physical Address** displays the street address, city, two-letter state abbreviation, and zip code at which the person resides.
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.

4. View the child's milestones.

   The **Milestones** section displays the following recorded dates:

   - **Referral Date** displays the date on which the referral was first viewed at the EI location.
   - **45-day Timeline** displays the date 45 days from the **Referral Date**.
   - **45-day Counter** displays the number of days between the current date and the person's **Referral Date**.
   - **Eligibility Date** displays the person's eligibility determination date.
   - **Initial IFSP** displays the date of the person's first IFSP team meeting.
   - **Transition Meeting** displays the date the transition meeting is due. This date is 180 calendar days before the child's 3rd birthday.

5. View the child's meetings.

   The **Meetings** section displays the due dates for the following meetings:

- **6-mo Review 1** displays the date the person's initial 6-month review is due. This date is 6 months from the initial IFSP meeting. Once the meeting is finalized, the meeting date is displayed.
- **Annual 1** displays the date on which the person's initial annual review is due. This date is 365 calendar days from the initial IFSP meeting. Once the meeting is finalized, the meeting date is displayed.
- **6-mo Review 2** displays the date the person's second 6-month review is due. This date is 183 calendar days after the **Annual 1** date. Once the meeting is finalized, the meeting date is displayed.
- **Annual 2** displays the date on which the person's second annual review is due. This date is 365 calendar days from the annual IFSP meeting. Once the meeting is finalized, the meeting date is displayed.
- **6-mo Review 3** displays the date the person's third 6-month review is due. This date is 183 calendar days after the annual IFSP meeting. Once the meeting is finalized, the meeting date is displayed.

6. View the information in the **Transition** section.

   The **Transition** section displays the child's transition information:

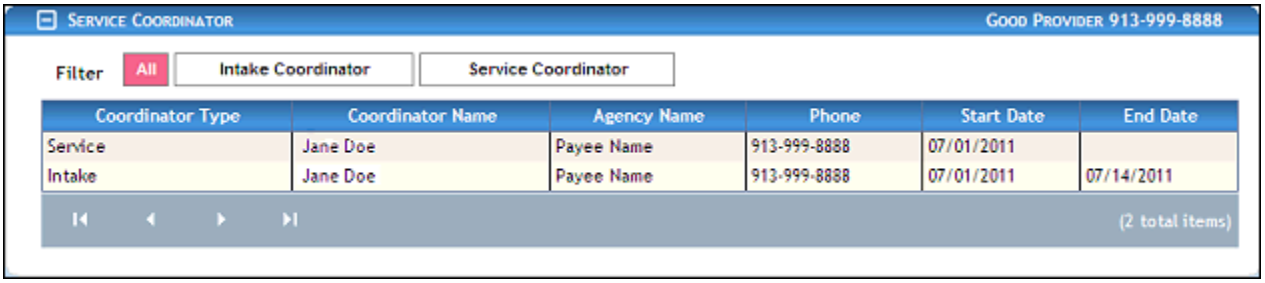
   - **School District Name** displays the name and/or number of the school district.
   - The **Family Signed Opt Out Form** check box indicates that the child has opted out, and that the opt out form has been signed by a family member.
   - **Parental Consent Date** displays the date parental consent was given to opt-out.
   - **If opting out, explain** displays the explanation for opting out.
   - **Anticipated Exit Date** displays the date of the person's anticipated exit. This date is 3 years from the child's date of birth.
   - **3rd Birthday Possible** displays "Yes" if the child's date of birth is between 4/1 and 9/7. Otherwise, it displays "No".

Tutorial: View a List of Coordinators for a Child

Use this tutorial to view a list of service or intake coordinators for a child and/or to filter the list of coordinators displayed in the **Coordinator** section of the Child Detail page.

Complete the following steps to perform this tutorial:

1. Display the Child Detail page.



Child Detail page (service coordinator default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View the most current service or intake coordinator first name, last name, and contact number in the section heading.
3. View the list of all service or intake coordinators in the **Coordinator** table.

   The table contains a list of all coordinators ever associated with the child. The **Coordinator Type** is based on the assignment to the child. Names are displayed based on **Start Date** in descending order. Detailed information about the coordinators displays in the following columns of the table:

   - **Coordinator Type** displays whether the coordinator is a Service or Intake coordinator.
   - **Coordinator Name** displays the person's first and last name.
   - **Agency** displays the name of the agency with which the person is associated (if applicable).
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Filter the results in the **Coordinator** table by clicking the following buttons:
   - Click **All** to display all results available.

- Select **Intake Coordinator** to only display results for intake coordinators.
- Select **Service Coordinator** to only display results for service coordinators.

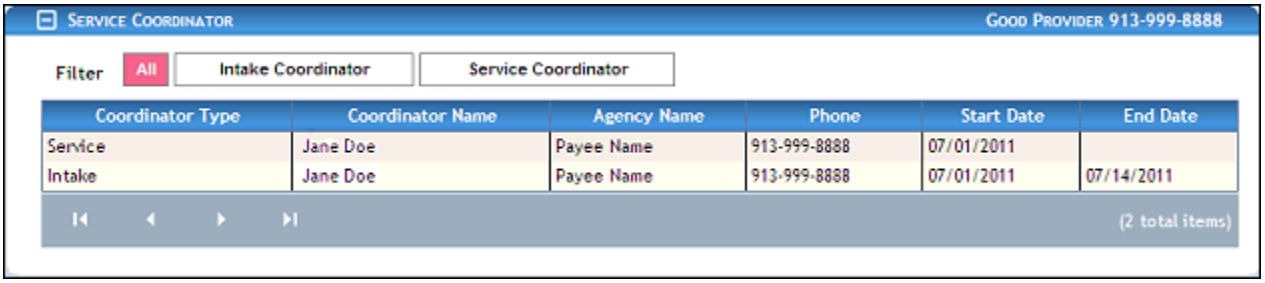
NOTE: You can double-click on a record in the table to view detailed information.

Tutorial: View a Coordinator's Details

Use this tutorial to view a service or intake coordinator's details in the **Coordinator** section of the Child Detail page.

Complete the following steps to perform this tutorial:

1. Display the Child Detail page.



Child Detail page (service coordinator default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. Double-click on a provider in the **Coordinator** table. The table contains a list of all providers associated with the child. The page refreshes and displays detailed information below the table.

Child Detail page (service coordinator details view)

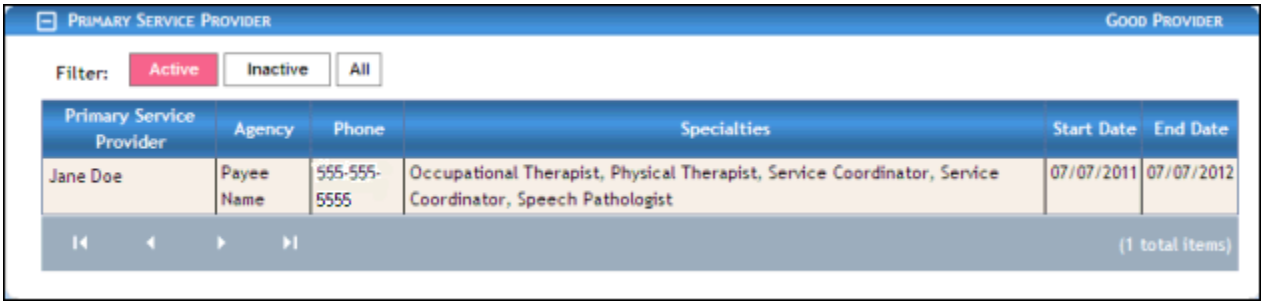
3. View the name and phone number of the currently assigned coordinator in the section heading.
4. View the following details:
   - **Coordinator** displays the person's first and last name.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

Tutorial: View a List of Primary Service Providers for a Child

Use this tutorial to view a list of Primary Service Providers for a child and/or to filter the list of providers displayed in the **Primary Service Provider** section of the Child Detail page.

Complete the following steps to perform this tutorial:

1. Display the Child Detail page.



Child Detail page (primary service providers default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View the most current Primary Service Provider's first and last name in the section heading.
3. View the list of all Primary Service Providers in the **Primary Service Providers** table.

   The table contains a list of all providers currently associated with the child. Detailed information about the providers displays in the following columns of the table:

   - **Primary Service Provider** displays the first and last name of the provider, or if there is no PSP Team serving the child, the text "Child Not Being Served".
   - **Agency** displays the name of the agency with which the person is associated (if applicable).
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Specialty** displays the individual's specialty.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Filter the results in the **Primary Service Providers** table by clicking the following buttons:
   - Click **All** to display all results available.

- Click **Active** to only display results that are currently active.
- Click **Inactive** to only display results that are currently inactive.

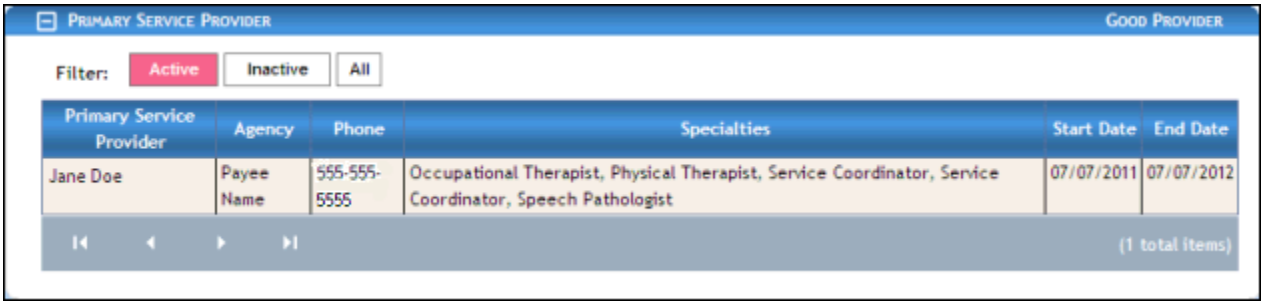
NOTE: You can double-click on a record in the table to view detailed information.

Tutorial: View a Primary Service Provider's Details

Use this tutorial to view detailed Primary Service Provider information in the **Primary Service Provider** section of the Child Detail page.

Complete the following steps to perform this tutorial:

1. Display the Child Detail page.

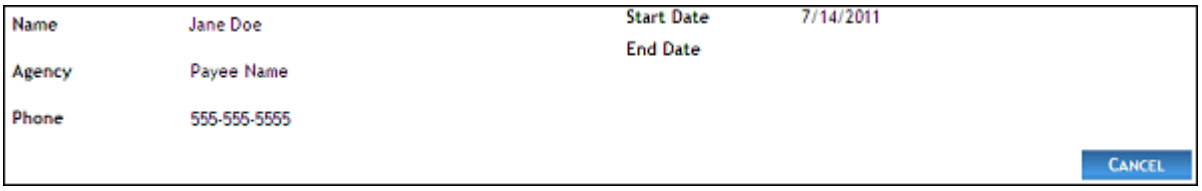


Child Detail page (primary service providers default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a provider listing in the **Primary Service Providers** table. The table contains a list of all Primary Service Providers currently associated with the child. The page refreshes and displays detailed information below the table.



Child Detail page (primary service provider details view)

3. View detailed information about the provider in the following controls:
   - **Name** displays the person's first and last name.
   - **Agency** displays the name of the agency with which the person is associated (if applicable).
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

   The data in this section of the page is read-only.

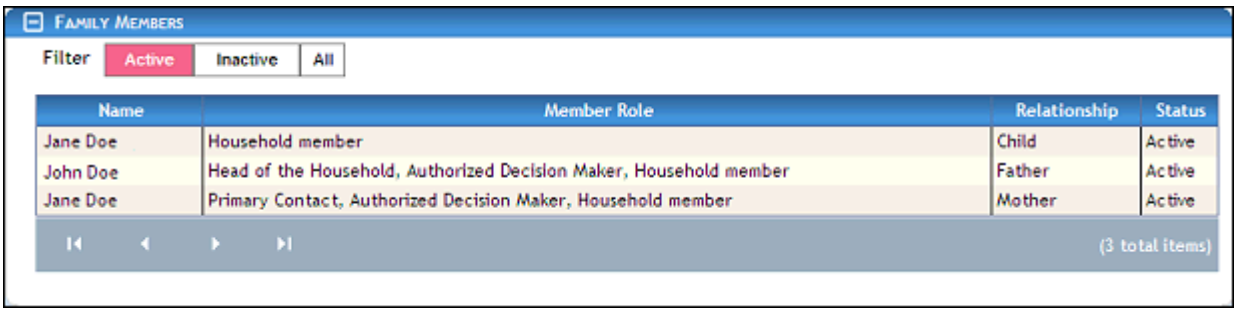
Family

Family

This page allows you to view, update, and add family members for a child.

To access this page, complete the following steps:

- Display the Child Detail page.
- On the **Child Detail** menu, select the **Family** menu option.



Family page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Family Members

You can add additional family members or update detailed information for existing family members on this page as necessary.

See the following topic(s) for more information:

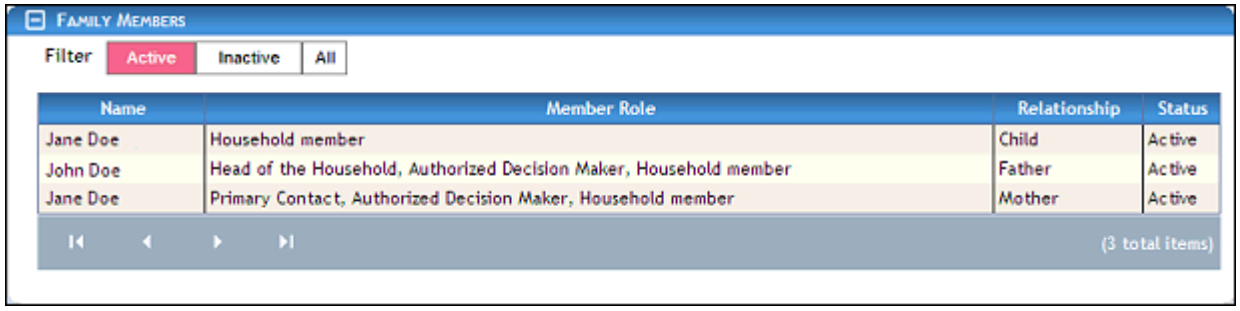
- Tutorial: View a List of Family Members for a Child
- Tutorial: View Family Member Details

Tutorial: View a List of Family Members for a Child

Use this tutorial to view the family members for a child and/or to filter the list of family members displayed on the Family page.

Complete the following steps to perform this tutorial:

1. Display the Family page.



Family page (default view)

2. View the list of family members in the **Family Members** table.

   The table contains a list of all family members for the child. Detailed information about the family members displays in the following columns of the table:

   - **Name** displays the person's first and last name.
   - **Role** displays the role currently assigned to the person.
   - **Relationship** displays the person's relationship to the household.
   - **Status** indicates whether the individual is currently active or inactive.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Filter the results in the **Family Members** table by clicking the following buttons:

   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

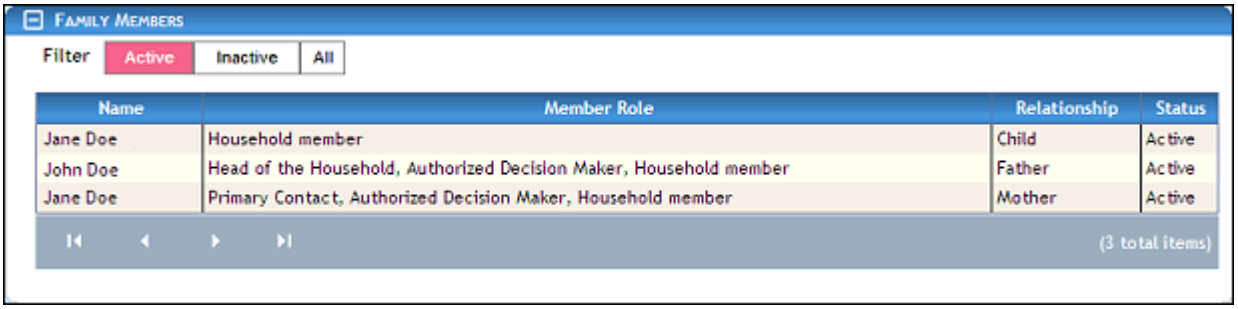
NOTE: You can double-click on a record in the table to view detailed information.

Tutorial: View Family Details

Use this tutorial to view the details for a family member on the Family page.

Complete the following steps to perform this tutorial:

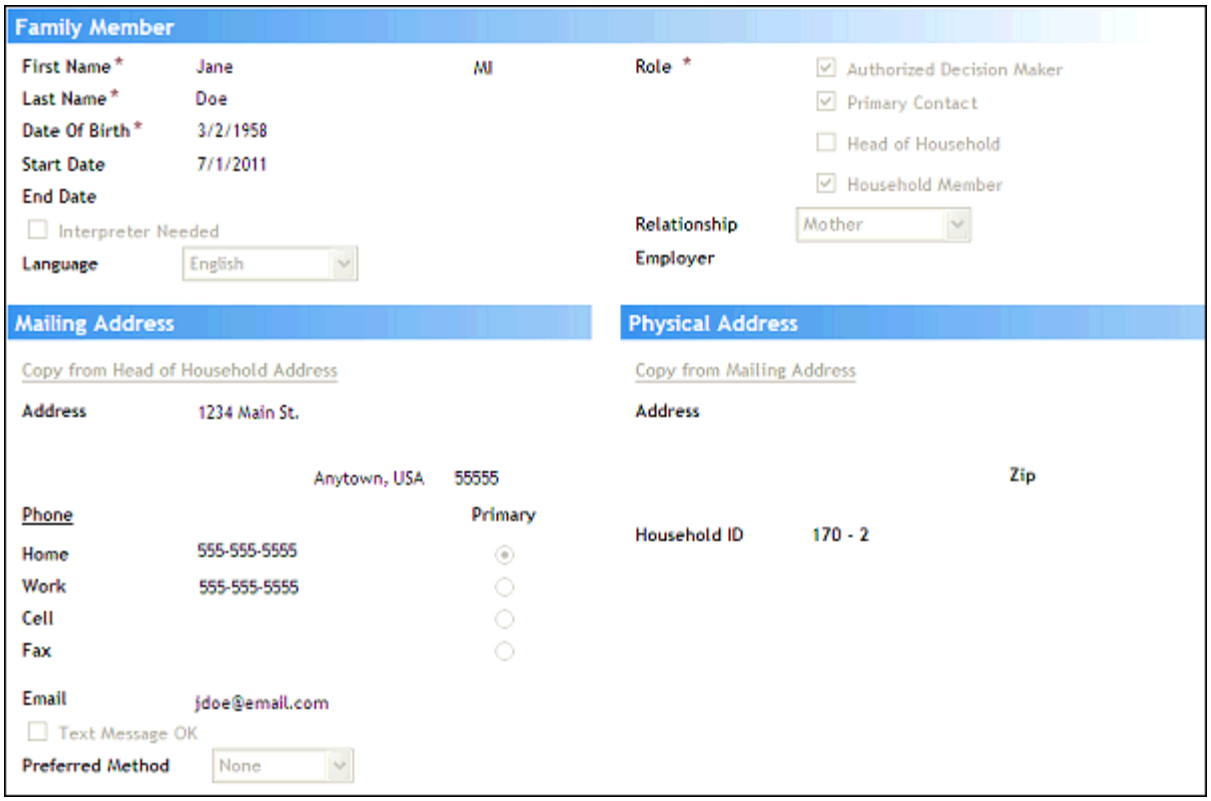
1. Display the Family page.



Family page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. Double-click on a family member in the table. The page refreshes and displays detailed information below the table.



Family page (details view)

3. View the family member's details.

   The **Family Member** section contains the family member's demographic data:

   - **First Name** displays the person's first name.
   - **Middle Name** displays the person's middle name.
   - **Last Name** displays the person's last name.
   - **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
   - **SSN** displays the social security number for the person.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.
   - **Interpreter Needed** indicates whether an interpreter is needed for verbal communication.
   - **Language** displays the person's primary language.
   - **Role** displays the role currently assigned to the person.
   - **Relationship** displays the person's relationship to the household.
   - **Employer** displays the name of the person's employer.

4. View the family member's mailing address.

   The **Mailing Address** section contains the location at which the family member receives mail:

   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **ZIP** displays the complete five-digit ZIP code in which the residence (or office) is located.
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Email** displays the individual's electronic mail address.
   - **Text Message OK** indicates whether it is acceptable to send text messages to the phone number listed.
   - **Preferred Method** displays the person's preferred method of contact.

5. View the family member's physical address.

   The **Physical Address** section contains the family member's residence information:

   - **Address** displays the street address, city, two-letter state abbreviation, and zip code.
   - **ZIP** displays the complete five-digit ZIP code in which the residence (or office) is located.
   - **Household ID** displays the household's identification number.

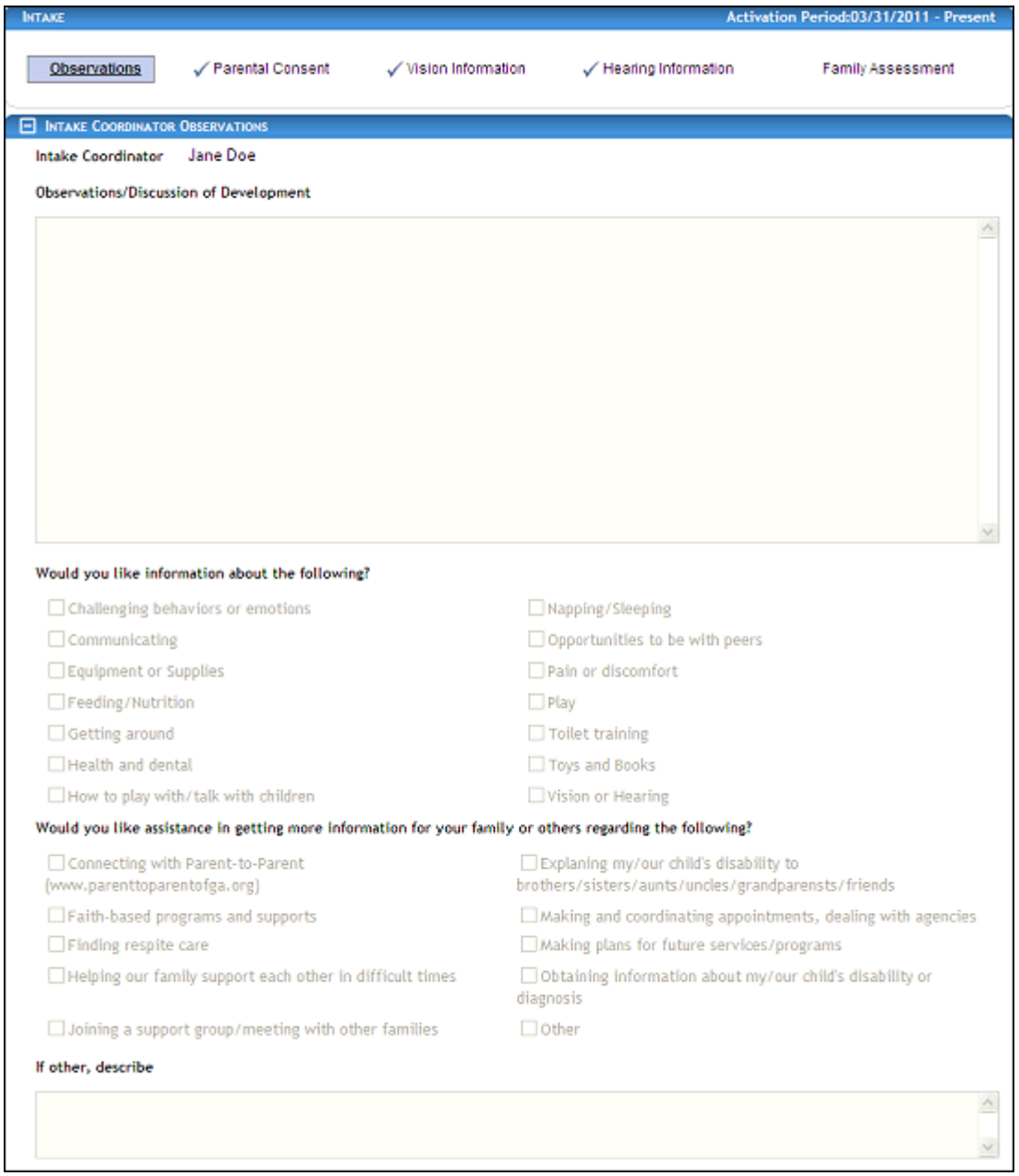
Intake

Intake

This page allows you to view and update the intake details for a child.

To access this page, complete the following steps:

- Display the Child Detail page.
- On the **Child Detail** menu, select the **Intake** menu option.



Intake page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Intake Information

You can view and update intake details for a child on this page as necessary.

See the following topic(s) for more information:

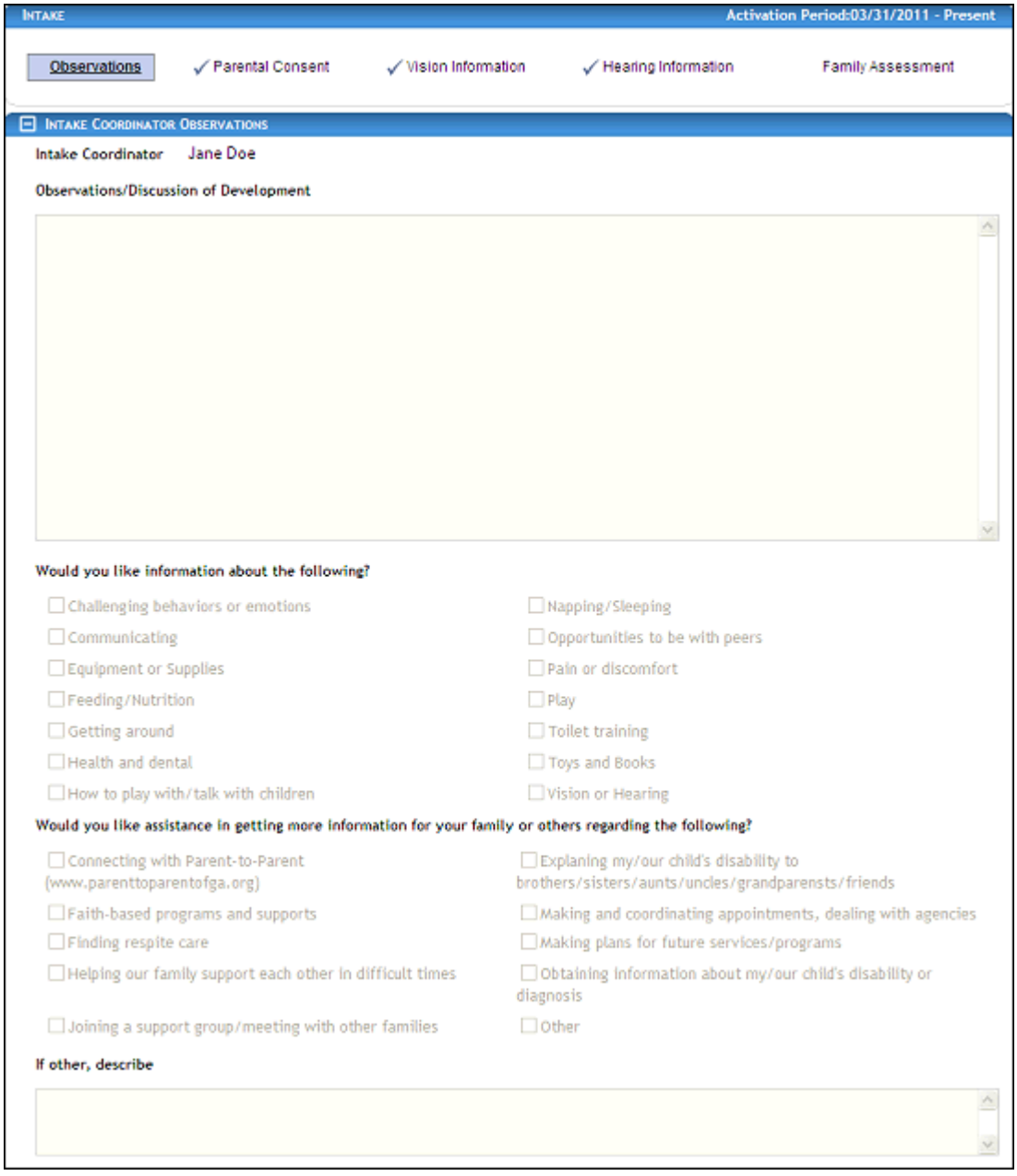
- Tutorial: View Intake Details

Tutorial: View Intake Details

Use this tutorial to view data on the intake coordinator's information on the Intake page.

Complete the following steps to perform this tutorial:

1. Display the Intake page.



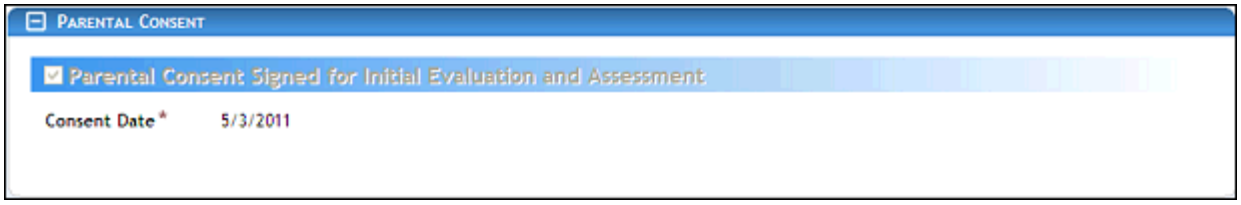
Intake page (default view)

NOTE: The **Observations** link is selected by default, and the page displays detailed observation information in the **Intake Coordinator Observations** section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

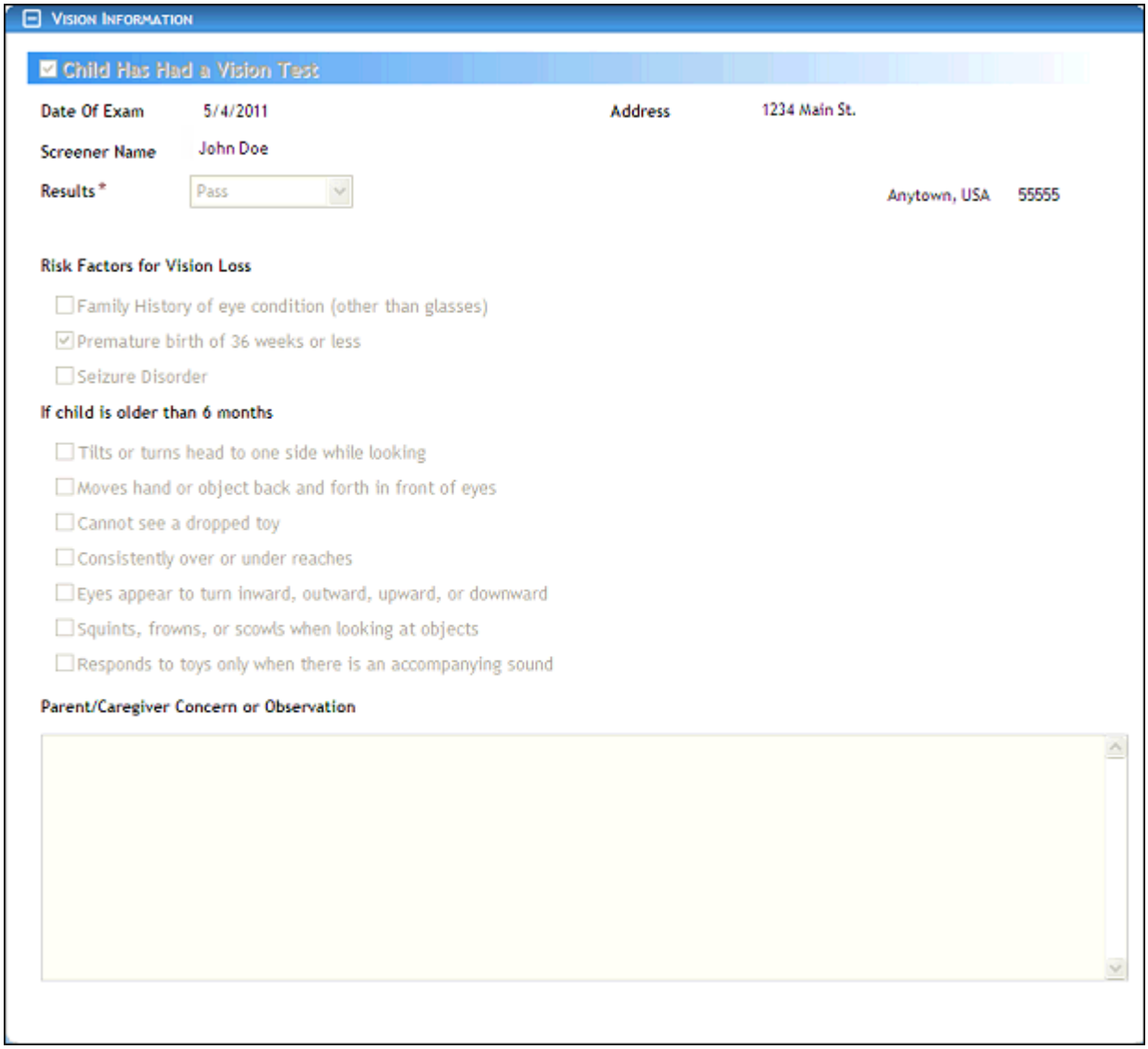
This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. Click the **Parental Consent** link. The page refreshes and displays detailed information in the **Parental Consent** section.



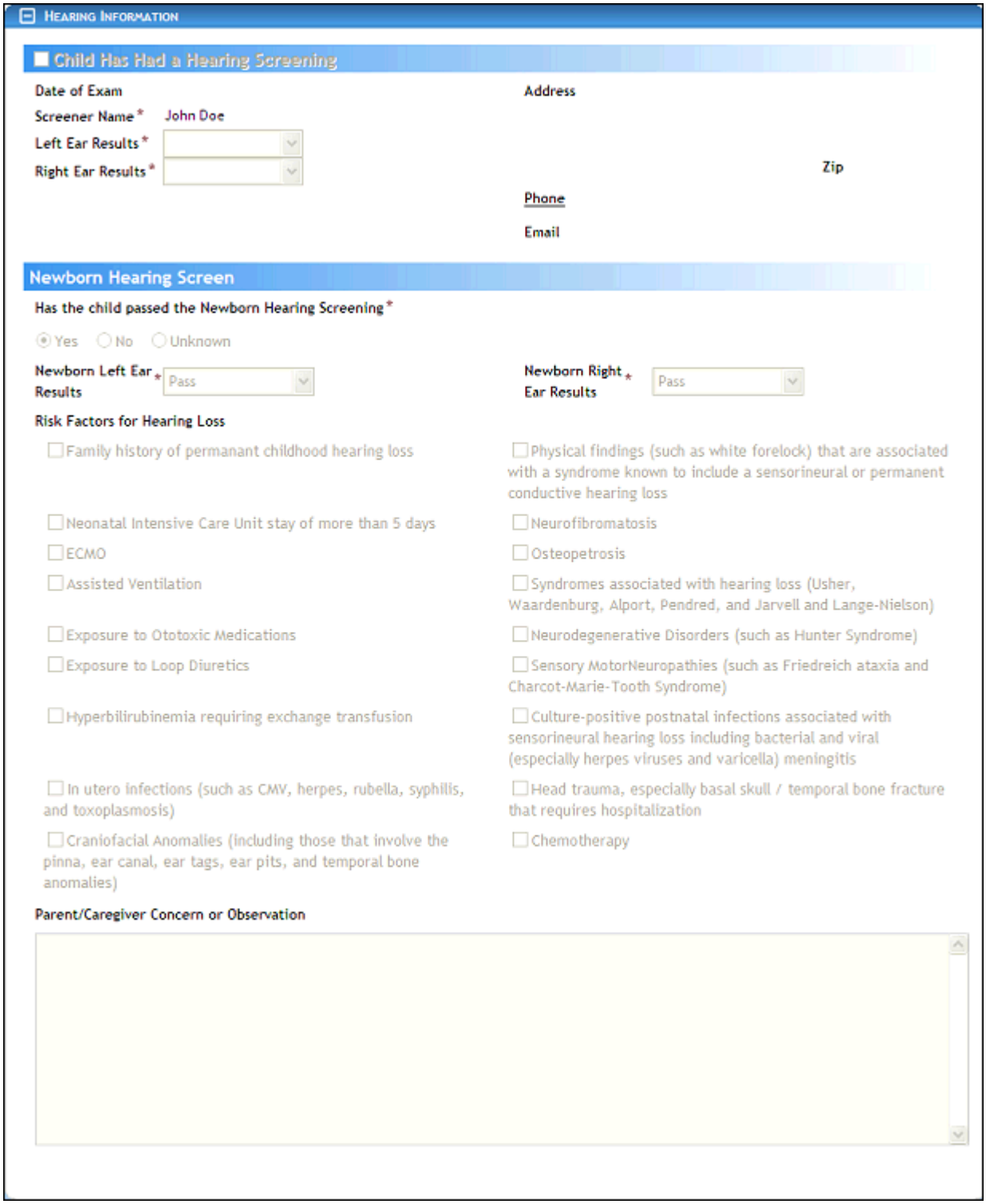
Intake page (parental consent details view)

3. Click the **Vision Information** link. The page refreshes and displays detailed information in the **Vision Screening** section.


Vision Information
Child Has Had a Vision Test
Date Of Exam
5/4/2011
Address
1234 Main St.
Screener Name
John Doe
Results *
Pass
Anytown, USA
55555
Risk Factors for Vision Loss
Family History of eye condition (other than glasses)
Premature birth of 36 weeks or less
Seizure Disorder
If child is older than 6 months
Tilts or turns head to one side while looking
Moves hand or object back and forth in front of eyes
Cannot see a dropped toy
Consistently over or under reaches
Eyes appear to turn inward, outward, upward, or downward
Squints, frowns, or scowls when looking at objects
Responds to toys only when there is an accompanying sound
Parent/Caregiver Concern or Observation

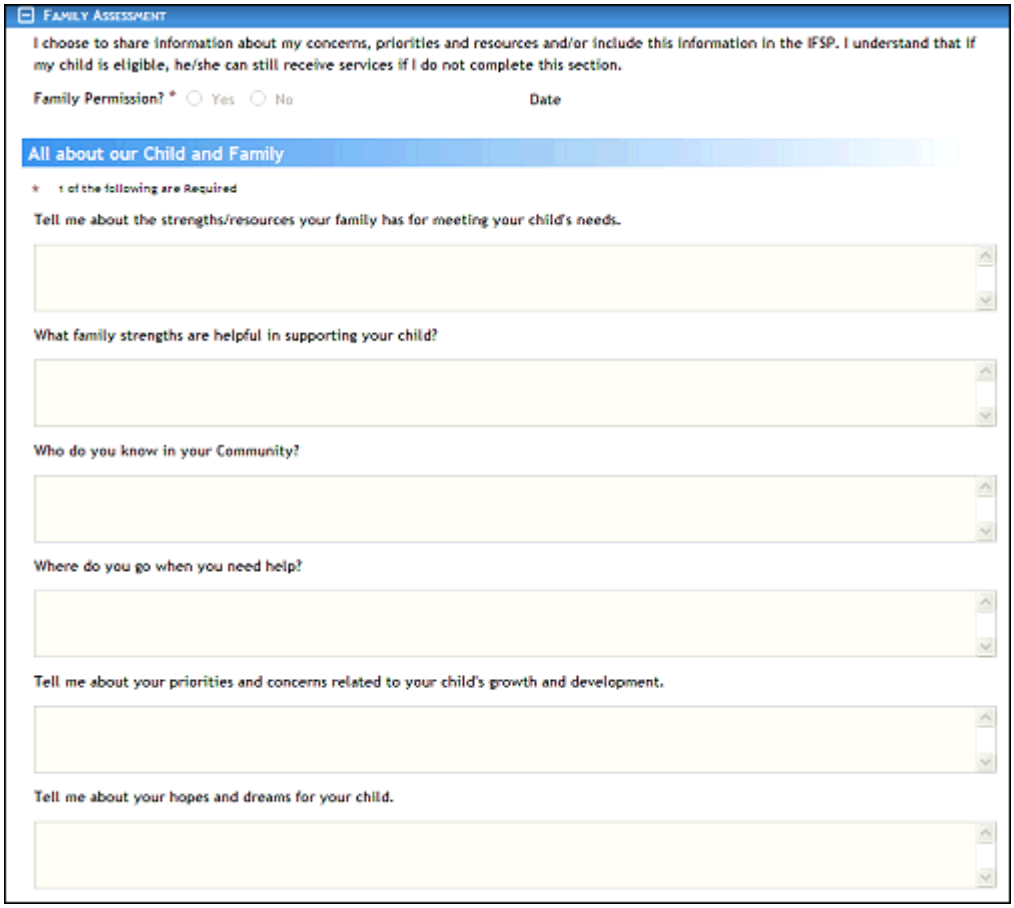
Intake page (vision information details view)

4. Click the **Hearing Information** link. The page refreshes and displays detailed information in the **Hearing Screening** section.


Hearing Information
Child Has Had a Hearing Screening
Date of Exam
Address
Screener Name *
John Doe
Left Ear Results *
Right Ear Results *
Zip
Phone
Email
Newborn Hearing Screen
Has the child passed the Newborn Hearing Screening *
Yes
No
Unknown
Newborn Left Ear Results *
Pass
Newborn Right Ear Results *
Pass
Risk Factors for Hearing Loss
Family history of permanant childhood hearing loss
Physical findings (such as white forelock) that are associated with a syndrome known to include a sensorineural or permanent conductive hearing loss
Neonatal Intensive Care Unit stay of more than 5 days
Neurofibromatosis
ECMO
Osteopetrosis
Assisted Ventilation
Syndromes associated with hearing loss (Usher, Waardenburg, Alport, Pendred, and Jarvell and Lange-Nielson)
Exposure to Ototoxic Medications
Neurodegenerative Disorders (such as Hunter Syndrome)
Exposure to Loop Diuretics
Sensory MotorNeuropathies (such as Friedreich ataxia and Charcot-Marie-Tooth Syndrome)
Hyperbilirubinemia requiring exchange transfusion
Culture-positive postnatal infections associated with sensorineural hearing loss including bacterial and viral (especially herpes viruses and varicella) meningitis
In utero infections (such as CMV, herpes, rubella, syphilis, and toxoplasmosis)
Head trauma, especially basal skull / temporal bone fracture that requires hospitalization
Craniofacial Anomalies (including those that involve the pinna, ear canal, ear tags, ear pits, and temporal bone anomalies)
Chemotherapy
Parent/Caregiver Concern or Observation

Intake page (hearing information details view)

5. Click the **Family Assessment** link. The page refreshes and displays detailed information in the **Family Assessment** and **Child Care** sections.


Family Assessment
I choose to share information about my concerns, priorities and resources and/or include this information in the IFSP. I understand that if my child is eligible, he/she can still receive services if I do not complete this section.
Family Permission? *
Yes
No
Date
All about our Child and Family
* 1 of the following are Required
Tell me about the strengths/resources your family has for meeting your child's needs.
What family strengths are helpful in supporting your child?
Who do you know in your Community?
Where do you go when you need help?
Tell me about your priorities and concerns related to your child's growth and development.
Tell me about your hopes and dreams for your child.

Intake page (family assessment details view)

Health

Health

This page allows you to view, enter, and update health information for a child.

To access this page, complete the following steps:
On the Child Detail page:

- On the **Child Detail** menu, select the **Health** menu option.

Health page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Health Information

You can manage detailed health information for children on this page by viewing, editing, and updating data as necessary.

See the following topic(s) for more information:

- Tutorial: View Health Details

Tutorial: View Health Details

Use this tutorial to view data on the child's health information on the Health page.

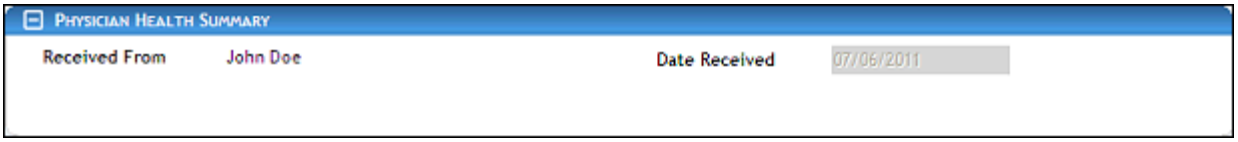
Complete the following steps to perform this tutorial:

1. Display the Health page.

Health page (default view)

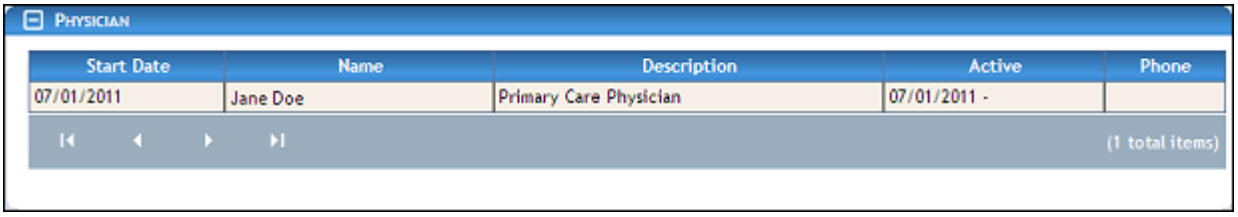
NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. Click the **[+]** to expand the **Physician Health Summary** section. The section expands to display additional information.



Health page (initial health summary details view)

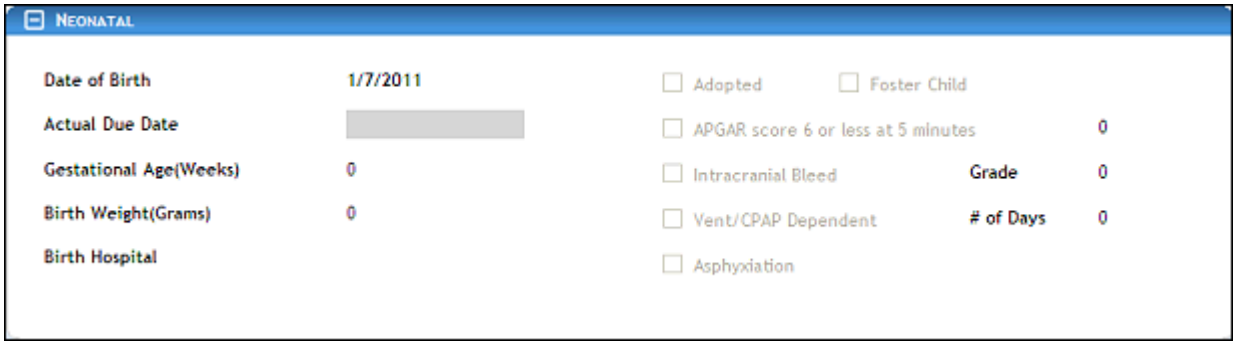
3. Click the **[+]** to expand the **Physician** section. The section expands to display additional information.



Health page (physician default view)

NOTE: You can double-click on a record in the table to view detailed information.

4. Click the **[+]** to expand the **Neonatal** section. The section expands to display additional information.

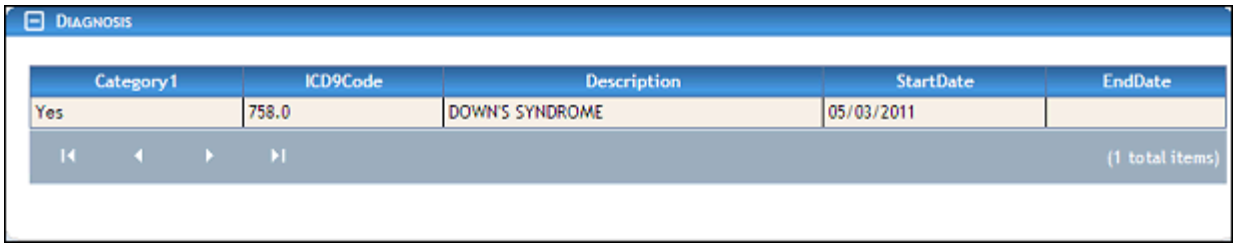


Health page (neonatal details view)

5. Click the **[+]** to expand the **General Health** section. The section expands to display additional information.

Health page (general health default view)

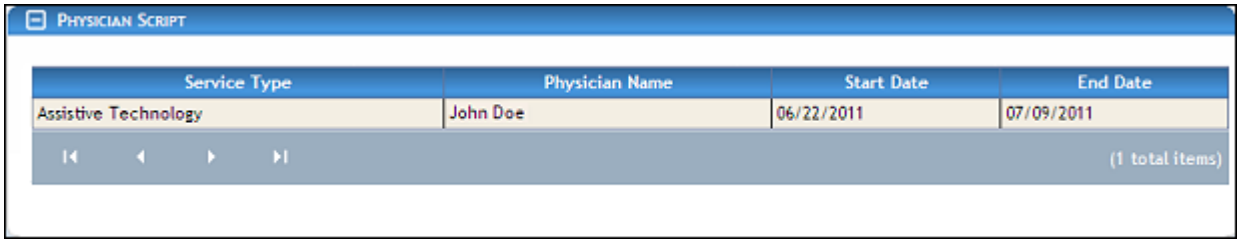
6. Click the **[+]** to expand the **Diagnosis** section. The section expands to display additional information.



Health page (diagnosis default view)

NOTE: You can double-click on a record in the table to view detailed information.

7. Click the **[+]** to expand the **Physician Script** section. The section expands to display additional information.



Health page (physician script default view)

NOTE: You can double-click on a record in the table to view detailed information.

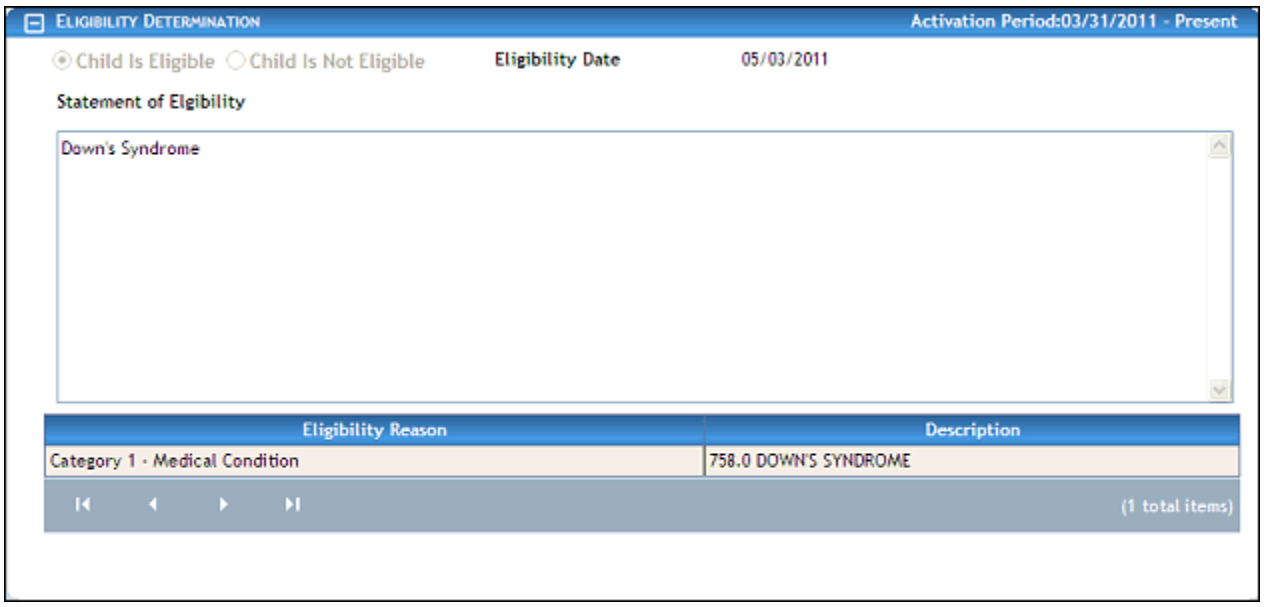
Eligibility

Eligibility

This page allows you to view, enter, and update eligibility data for a child.

To access this page, complete the following steps:

- Display the Child Detail page.
- On the **Child Detail** menu, select the **Eligibility** menu option.



Eligibility page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Eligibility Information

You can manage detailed eligibility information for children on this page by viewing, editing, and updating data as necessary.

See the following topic(s) for more information:

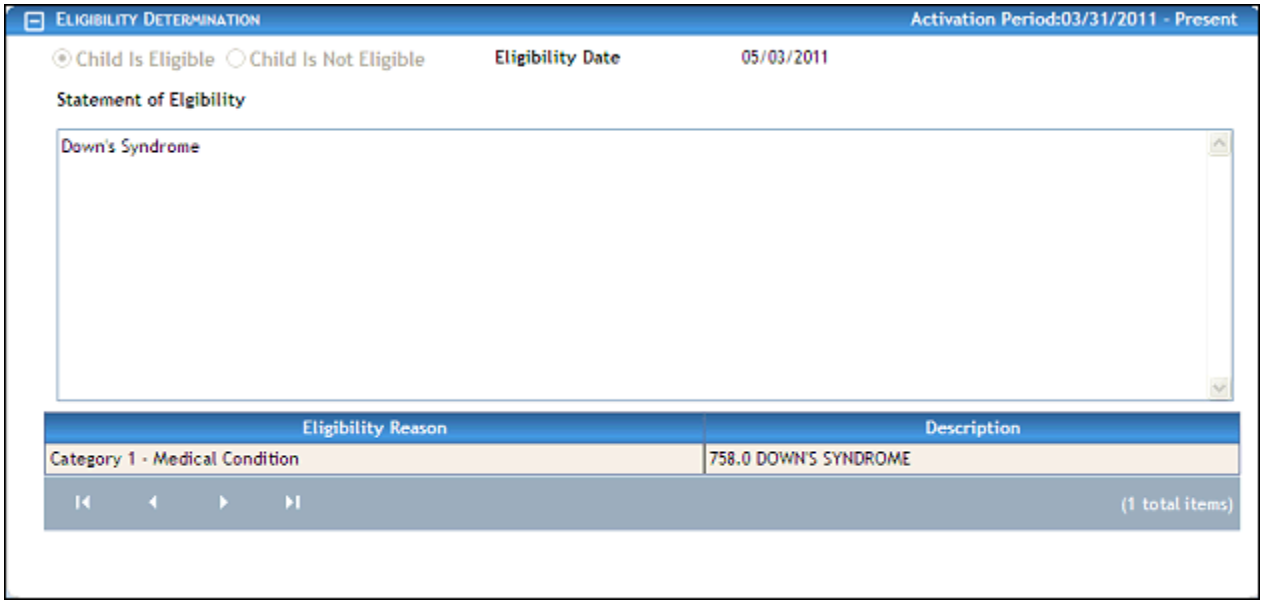
- Tutorial: View a Child's Eligibility Determination and List of Eligibility Reasons
- Tutorial: View a List of Eligibility Sources

Tutorial: View a Child's Eligibility Determination and List of Eligibility Reasons

Use this tutorial to view a child's eligibility determination and list of eligibility reasons in the **Eligibility Determination** section of the Eligibility page.

Complete the following steps to perform this tutorial:

1. Display the Eligibility page.



Eligibility page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View or select the **Activation Period** in the **Eligibility Determination** heading. If only one Activation Period exists for the child, the Activation Period is read-only and cannot be selected or changed.
3. View the child's eligibility determination.
   - **Child Is Eligible** is selected if the is currently eligible for participation.
   - **Child Is Not Eligible** is selected if the child is currently ineligible for participation.
   - **Eligibility Date** displays the person's eligibility determination date.
   - **Statement of Eligibility** displays a description of the child's eligibility determination.
   - **Eligibility Diagnosis** displays the person's ICD9 eligibility diagnosis code.
   - **Description** displays additional descriptive information.
   - **Deactivation Reason** displays the text "Part C Ineligible" if the child is not eligible.
   - **Ineligibility Reason** displays the reasons why the child was deemed ineligible.

   The data in this section of the page is read-only.

NOTE: If the child is eligible, then **Eligibility Date**, **Eligibility Diagnosis**, and **Description** are displayed. If the child is not eligible, then **Deactivation Reason** and **Ineligibility Reason** are displayed.

4. View the list of eligibility reasons for the child in the table.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

The table contains a list of all eligibility reasons currently associated with the child. One eligibility reason must be designated as the primary reason. Detailed information about the eligibility reasons displays in the following columns of the table:

- **Eligibility Reason** displays the reason for the person's eligibility determination.
- **Detail** displays the eligibility reason detail.

The data in these columns of the table is read-only.

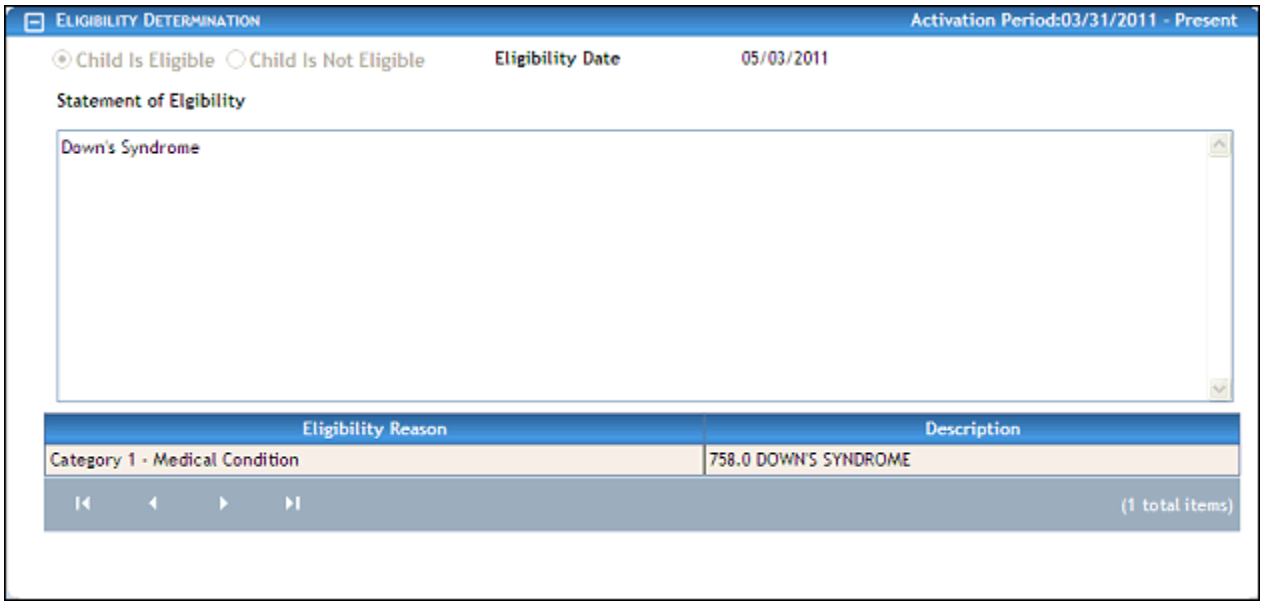
NOTE: You can double-click on a record in the table to view detailed information.

Tutorial: View a List of Eligibility Sources

Use this tutorial to view a list of eligibility sources in the **Eligibility Sources** section of the Eligibility page.

Complete the following steps to perform this tutorial:

1. Display the Eligibility page.



Eligibility page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. Click the **[+]** to expand the **Eligibility Sources** section. The page expands to display a table.

Eligibility page (eligibility sources default view)

3. View the list of all eligibility sources for a child in the table.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

The table contains a list of all eligibility sources currently associated with the child. Detailed information about the eligibility sources displays in the following columns of the table:

- **Name** displays the person's first and last name.
- **Role** displays the role currently assigned to the person.
- **Input Method** displays the method in which the source was input.

The data in these columns of the table is read-only.

NOTE: You can double-click on a record in the table to view detailed information.

IFSP

IFSP Meetings

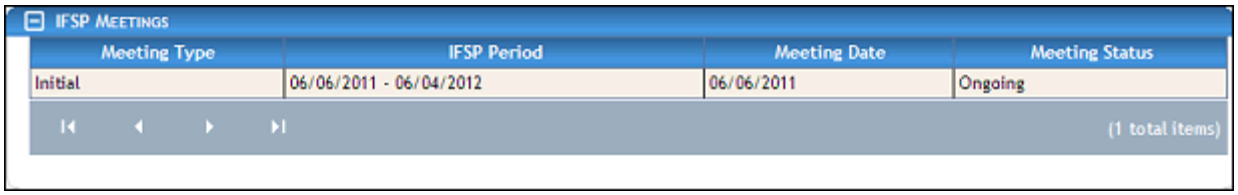
This page allows you to view, enter, and update IFSP meetings for a child.

To access this page, complete the following steps:
On the Home page:

- In the **Meetings** section, select the **Meetings Scheduled** link. The Meetings Scheduled page displays.
- Double-click on a child record in the table.

On the Child Detail page:

- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Meetings** sub-menu option.



IFSP Meetings page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing IFSP Meetings

You can manage detailed information for IFSP meetings on this page by viewing, editing, and updating data as necessary.

See the following topic(s) for more information:

IFSP Meetings

- Tutorial: View a List of IFSP Meetings for a Child
- Tutorial: View Transition Meeting Details

Tutorial: View a List of IFSP Meetings for a Child

Use this tutorial to view a list of IFSP meetings for a child on the IFSP Meetings page.

Complete the following steps to perform this tutorial:

1. Display the IFSP Meetings page.

IFSP Meetings page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View the list of meetings in the **IFSP Meetings** table.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

The table contains a list of meetings currently associated with a child. Detailed information about the meetings displays in the following columns of the table:

- **Meeting Type** displays the type of activity.
- **IFSP Period** displays the beginning and ending dates of the IFSP period.
- **Meeting Date** displays the date of the activity.
- **Meeting Status** displays the current status of the activity.

The data in these columns of the table is read-only.

NOTE: You can double-click on a record in the table to view detailed information.

Tutorial: View Transition Meeting Details

Use this tutorial to view the transition meeting details on the IFSP Meetings page.

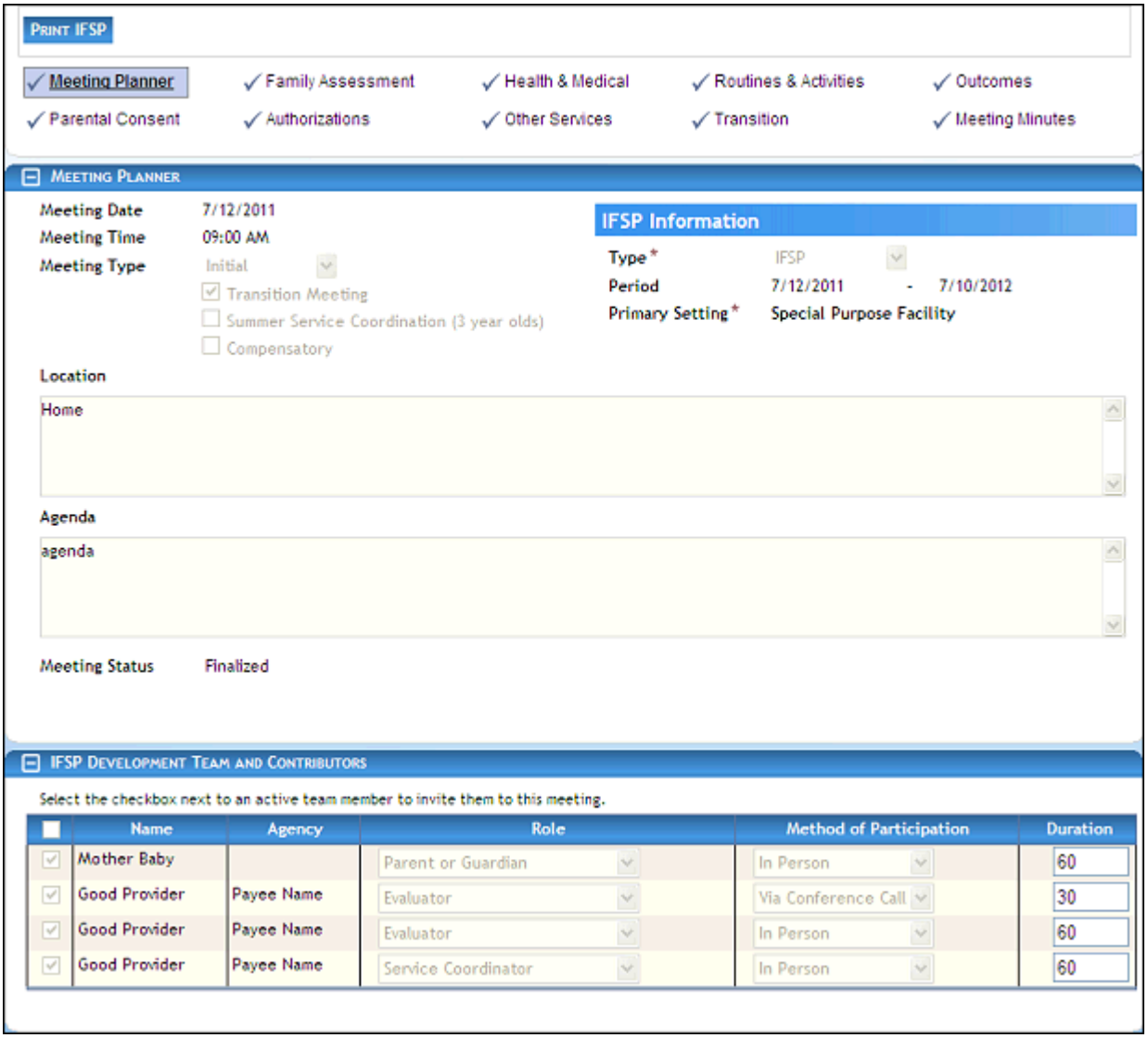
Complete the following steps to perform this tutorial:

1. Display the IFSP Meetings page.

IFSP Meetings page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

2. Double-click on a transition meeting in the **IFSP Meetings** table. The page refreshes and displays detailed information below the table.

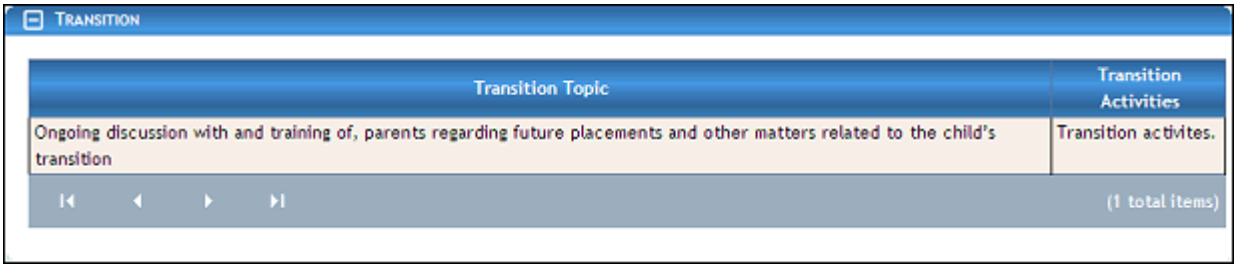


IFSP Meetings page (meeting planner view)

3. Click the **Transition** link. The page refreshes and displays an **Transition** section.

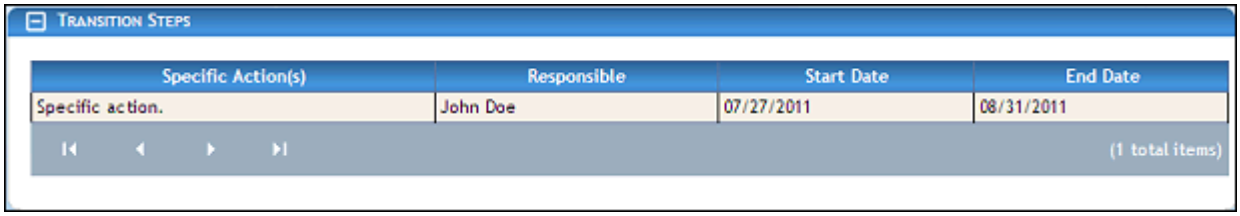
NOTE: Depending on the status of the selected meeting, the data displayed on the page may be read-only or unavailable. Meetings with a status of On-going or Scheduled can be updated; however, some information populated from previous meetings is view-only. Meetings with a status of Finalized are read-only and cannot be updated. For meetings with a status of Tentative, Cancelled, or Rescheduled, this page is not available.

4. View the transition information displayed in the **Transition** section.


Transition
Transition Topic
Transition Activities
Ongoing discussion with and training of, parents regarding future placements and other matters related to the child's transition
Transition activites.
(1 total items)

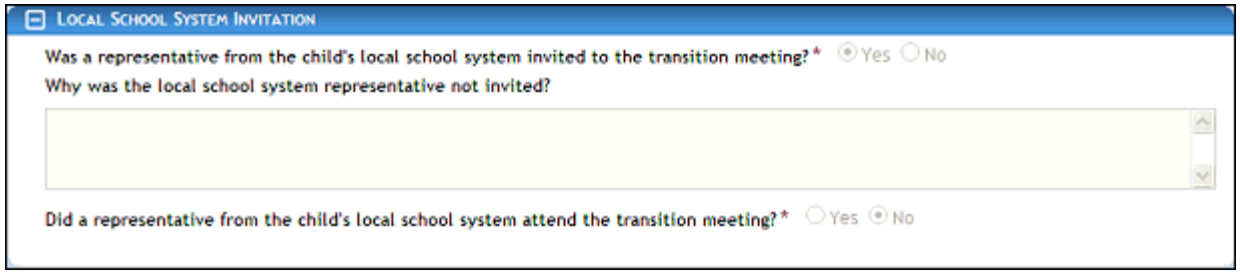
IFSP Meetings page (transition default view)

5. View the local school system invitation information displayed in the **Local School System Invitation** section.



IFSP Meetings page (transition steps view)

6. View the transition steps displayed in the **Transition Steps** section.


Local School System Invitation
Was a representative from the child's local school system invited to the transition meeting? * Yes No
Why was the local school system representative not invited?
Did a representative from the child's local school system attend the transition meeting? * Yes No

IFSP Meetings page (local school system invitation default view)

7. View the other programs and services displayed in the **Other Programs and Services** section.

IFSP Meetings page (other programs and services default view)

NOTE: Some of the information is displayed only for transition meetings. Transition meetings are identified in the **Meeting Planner** section on the IFSP Meetings page. For more information, see the Tutorial: Add an IFSP Meeting for a Child topic. Depending on your current permissions, this information may be updated.

Tutorial: View or Print Meeting Minutes for IFSP Meetings

Use this tutorial to view print meeting minutes in PDF format on the IFSP Meetings page.

Complete the following steps to perform this tutorial:

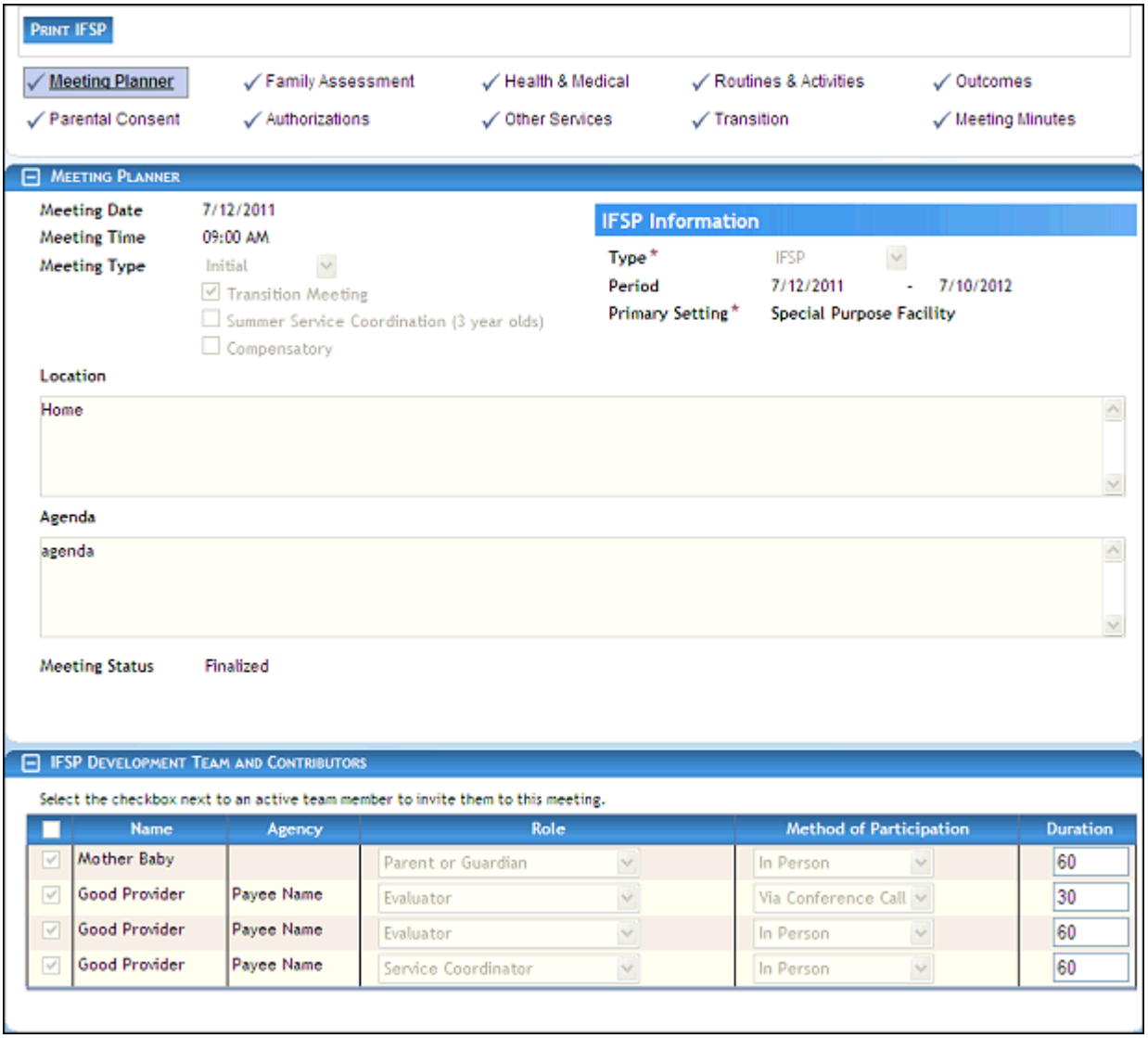
1. Display the IFSP Meetings page.

IFSP Meetings page (default view)

NOTE: This page contains collapsible data. Sections can be collapsed by clicking the **[-]** beside the section heading. Click the **[+]** to expand the section.

Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

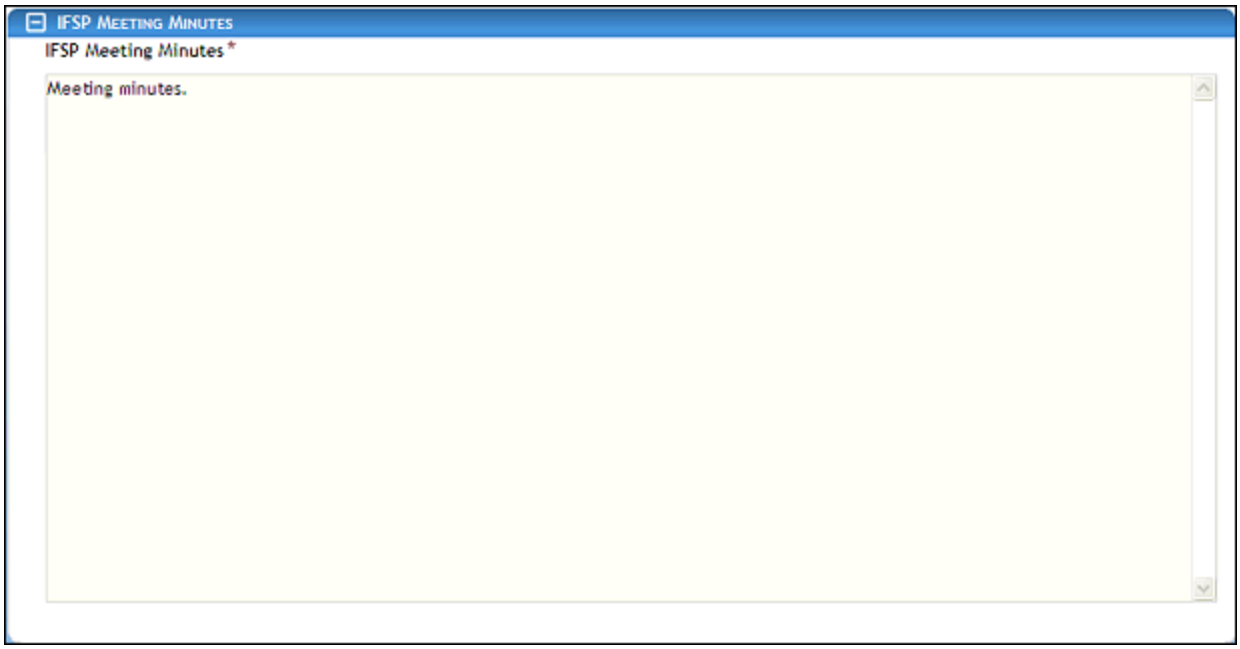
2. Double-click on a meeting in the **IFSP Meetings** table. The page refreshes and displays detailed information below the table.



IFSP Meetings page (meeting planner view)

3. View the selected meeting date and status in the **IFSP Meetings** section heading.
4. Use the function buttons to manage the IFSP meeting:
    - Click **Cancel Meeting** to cancel a scheduled IFSP team meeting.
    - Click **Reschedule Meeting** to reschedule a scheduled IFSP team meeting.
    - Click **Household Worksheet** to display the Household Date Worksheet in PDF format.
    - Click **Print IFSP** to display the Individualized Family Service Plan in PDF format for finalized meetings.
    - Click **Finalize IFSP** to finalize an on-going IFSP team meeting.
    - Click **Delete Meeting** to delete a scheduled IFSP team meeting.
    - Click **Schedule Meeting** to schedule a tentative IFSP team meeting.
    - Click **Amend IFSP** to modify IFSP meeting attendance within 60 days of the meeting date. All meeting types can be amended by case administrators only. For more information about amending meetings, see the Amendment Information topic.
    - Click **Cancel Amendment** to cancel the amendment to the IFSP meeting.

5. Click the **Meeting Minutes** link. The page refreshes and displays additional fields for entry.



IFSP Meetings page (meeting minutes view)

6. View or update the meeting minutes details as follows:

   In **Meeting Minutes**, enter notes, comments, or details. Up to 1000 characters can be entered as necessary.

NOTE: Depending on the status of the selected meeting, the data displayed on the page may be read-only or unavailable. Meetings with a status of On-going or Scheduled can be updated; however, some information populated from previous meetings is view-only. Meetings with a status of Finalized are read-only and cannot be updated. For meetings with a status of Tentative, Cancelled, or Rescheduled, this page is not available.

7. Click the **Print** button to generate a report for the meeting minutes in PDF format.

NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to your browser's help system.

IFSP Team Members

This page allows you to view and manage a list of members on an IFSP team for a child.

To access this page, complete the following steps:

- Display the Child Detail page.
- On the **Child Detail** menu, select the **IFSP** menu option. A sub-menu displays.
- Select the **IFSP Team** sub-menu option.

IFSP Team Members page (default view)

Managing IFSP Team Members

You can view existing team members, add new team members, or update detailed information for existing team members on this page as necessary. Depending on whether the team member is Associated with the child record, Activated in the system, or Deactivated, the page displays differently and some information may be disabled or unavailable.

See the following topic(s) for more information:

- Tutorial: View a List of IFSP Team Members for a Child

Tutorial: View a List of IFSP Team Members for a Child

Use this tutorial to view a list of IFSP team members for a child and/or to filter the list of team members displayed on the IFSP Team Members page.

Complete the following steps to perform this tutorial:

1. Display the IFSP Team Members page.

IFSP Team Members page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View the list of team members in the **IFSP Team Members** table.

   The table contains a list of all team members currently on the child's IFSP team. Detailed information about the team members displays in the following columns of the table:

   - **Member Name/Agency** displays the first and last name of the person and the name of the agency with which the person is associated.
   - **Role** displays the role currently assigned to the person.
   - **Specialty** displays the individual's specialty.
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
   - **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Filter the results in the **IFSP Team Members** table by clicking the following buttons:
   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.

- Click **All** to display all results available.

NOTE: You can double-click on a record in the table to view detailed information.

Services

Authorizations

This page allows you to view and filter for a list of authorizations for a child and to generate an Authorizations report containing a filtered list of authorizations that currently exist for the child in PDF format.

To access this page, complete the following steps:

- Display the Child Detail page.
- On the **Child Detail** menu, select the **Services** menu option. A sub-menu displays.
- Select the **All Authorizations** sub-menu option.

Authorizations page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Authorizations

You can manage authorizations for children on this page by filtering, viewing, and printing data as necessary.

See the following topic(s) for more information:

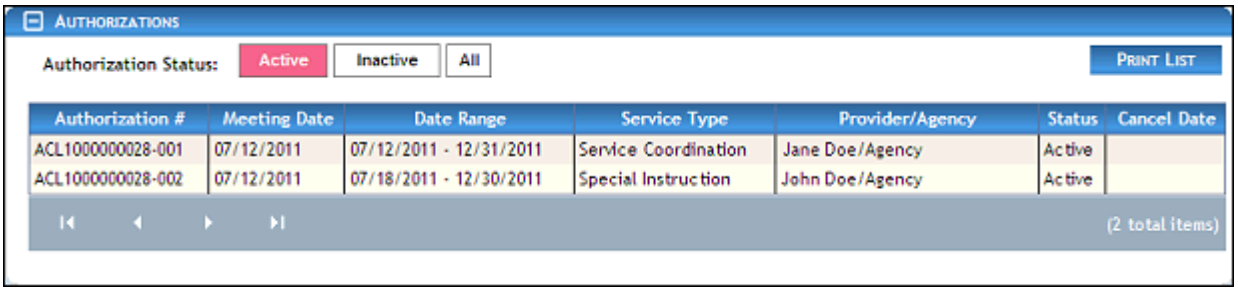
- Tutorial: View Authorization Details
- Tutorial: View or Print a List of Authorizations for a Child

Tutorial: View or Print a List of Authorizations for a Child

Use this tutorial to view a list of authorizations for a child on the Authorizations page.

Complete the following steps to perform this tutorial:

1. Display the Authorizations page.



Authorizations page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. View the list of authorizations for the child in the **Authorizations** table.

   The table contains a list of all authorizations associated with a child. Detailed information about the authorizations for the child displays in the following columns of the table:

   - **Authorization #** displays the identification number for the authorization.
   - **Date Range** displays the beginning and ending dates for the activity. If the status of the authorization is "Canceled", the ending date of the date range displays the end date of the authorization.
   - **Service Type** displays the type of service provided.
   - **Procedure** displays additional details about the service.
   - **Provider/Agency** displays the name of the agency or provider with which the service is associated.
   - **Status** displays the current status of the activity.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Filter the results in the **Authorizations** table by clicking the following buttons:

   - Click **Active** to only display results that are currently active.
   - Click **Inactive** to only display results that are currently inactive.
   - Click **All** to display all results available.

NOTE: You can double-click on a record in the table to view detailed information.

4. Click **Print List** to print the list of authorizations currently displayed in the **Authorizations** table for the child in PDF format.

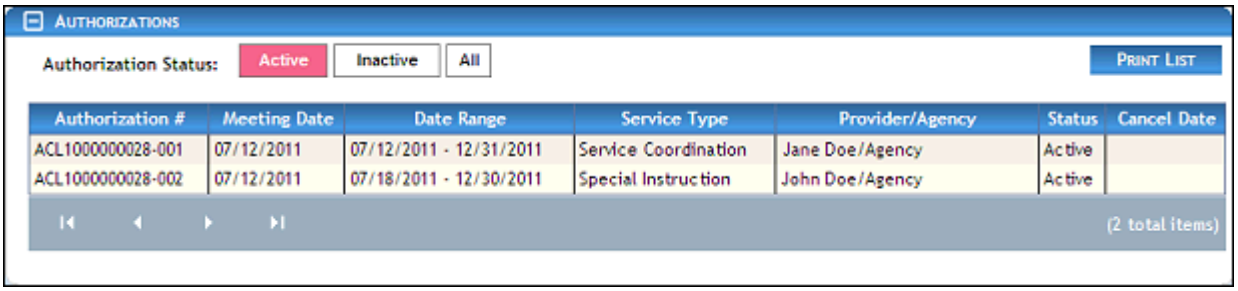
NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to your browser's help system.

Tutorial: View Authorization Details

Use this tutorial to view the details of authorizations for a child on the Authorizations page.

Complete the following steps to perform this tutorial:

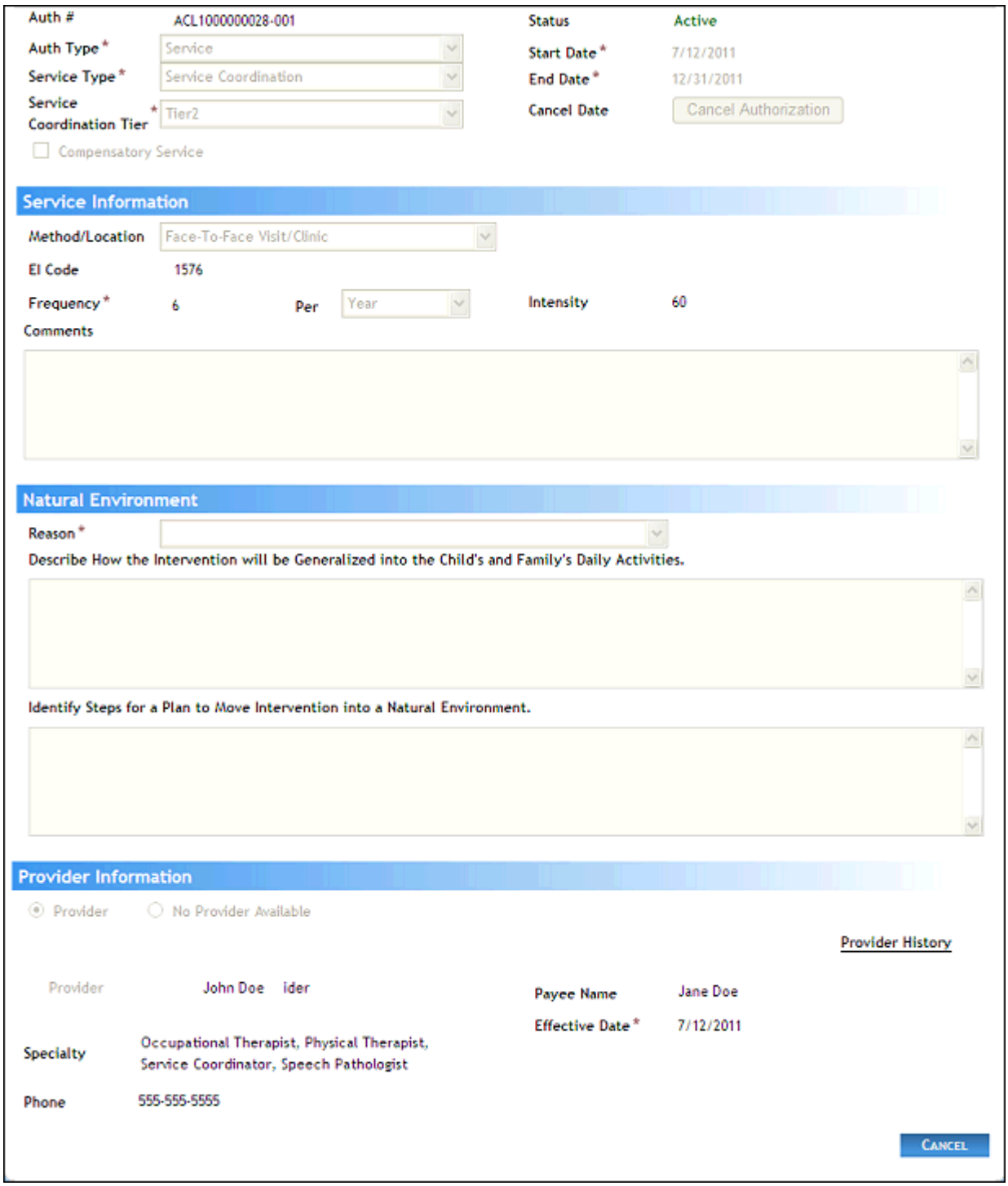
1. Display the Authorizations page.



Authorizations page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

2. Double-click on an authorization in the **Authorizations** table. The page refreshes and displays detailed information below the table.



Authorizations page (details view)

3. View the authorization details as follows:
    - **Authorization #** displays the identification number for the authorization.
    - **Authorization Type** displays the category of activity to which the authorization applies.
    - **Service Type** displays the type of service provided.

- In **Assessment Reason**, select one of the radio buttons to indicate whether the assessment is to determine eligibility or for IFSP development.
- **Compensatory Service** indicates that the service is being performed as a compensatory service.
- In **Related Domains**, select one or more check boxes to indicate the domain(s) to which the transition issue is related.
- **Authorization Status** displays the current status of the authorization.
- **Start Date** displays the date on which the activity begins.
- **End Date** displays the date on which the activity is or was completed.
- **Cancel Date** displays the date on which the activity was discontinued or canceled.

NOTE: Depending on the options selected in **Auth Type** and **Service Type**, some data may be disabled or unavailable and different sections may be displayed.

4. View the authorization details in the **Related Outcomes** section:

   Related Outcomes displays a list of outcomes defined for the IFSP, and indicates which were associated to the authorization.

5. View the authorization details in the **Service Information** section:

   If Assistive Technology was selected in **Service Type**, the following controls appear:

   - **HCPCS Code** displays the selected HCPCS code for the service.
   - **Description** displays additional descriptive information.
   - **Type** displays the service type.
   - **User Description** displays additional descriptive information.
   - **Quantity** displays the numeric quantity for Purchase or Repair service types.
   - **Price** displays the dollar amount for the purchase or repair.
   - **Total Amount** displays the total of the Quantity multiplied by the Price.

   If Occupational Therapy, Service Coordination, Special Instruction, Speech Language Pathology, or Trans. & Related Cost was selected in **Service Type**, the following controls appear:

   - **Method/Location** displays the selected method and location of the service or meeting.
   - **Frequency** displays the frequency of the activity.
   - **Per** defines the frequency of the activity.
   - **Intensity** displays the intensity of the activity.
   - **Max Miles** displays the maximum number of miles for the transportation authorization.
   - **Comments** displays additional notes or details.

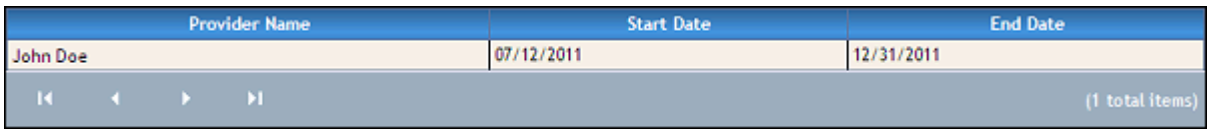
6. View the authorization details in the **Team Meeting Information** section:

   - **Method/Location** displays the selected method and location of the service or meeting.
   - **EI Code** displays the EI identification number and description.
   - **Frequency** displays the frequency of the activity.
   - **Per** defines the frequency of the activity.
   - **Intensity** displays the intensity of the activity.
   - **Comments** displays additional notes or details.

7. View the authorization details in the **Related Domains** section for an Evaluation/Assessment authorization:

- **Thinking/Learning** indicates that a person's thinking or learning ability is related to the activity.
- **Communication** indicates that a person's communication skills are related to the activity.
- **Self-Help** indicates that a person's ability for self-help is related to the activity.
- **Movement** indicates that a person's mobility is related to the activity.
- **Social/Behaviors** indicates that a person's social skills or behavior is related to the activity.
- **Vision** indicates that a person's vision is related to the activity.
- **Hearing** indicates that a person's hearing is related to the activity.

8. View the authorization details in the **Evaluation & Assessment Information** section for an Evaluation/Assessment authorization:
   - **Reason** indicates whether eligibility is being determined or the person is in IFSP.
   - **Method/Location** displays the selected method and location of the service or meeting.
   - **EI Code** displays the EI identification number and description.
   - **Frequency** displays the frequency of the activity.
   - **Per** defines the frequency of the activity.
   - **Intensity** displays the intensity of the activity.
   - **Comments** displays additional notes or details.
9. View the provider details of the authorization in the **Provider Information** section:
   - **Provider/No Provider Available** indicates whether provider information was available.
   - **Provider Name** displays the name of the service provider.
   - **Specialty** displays the individual's specialty.
   - **Phone** displays the telephone numbers at which the person (or primary contact) can be contacted.
   - **Payee Name** displays the name of the person or group to which payment is made.
   - The date displayed is the effective date of the provider's assignment.
10. Click the **Provider History** link to view all providers previously associated with the authorization. The page refreshes and displays a table with provider details.



Authorizations page (provider history details view)

The table contains a list of all providers for a child. Detailed information about the providers displays in the following columns of the table:

- **Provider Name** displays the name of the service provider.
- **Start Date** displays the date on which the person (or group) becomes (or became) active or assigned.
- **End Date** displays the date on which the person (or group) becomes (or became) inactive or unassigned.

The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

11. Double-click on a provider in the table to view the provider's details. The page refreshes and displays the selected provider's details as described in the **Provider Information** section.
12. Click **Print List** to print a list of authorizations in PDF format.

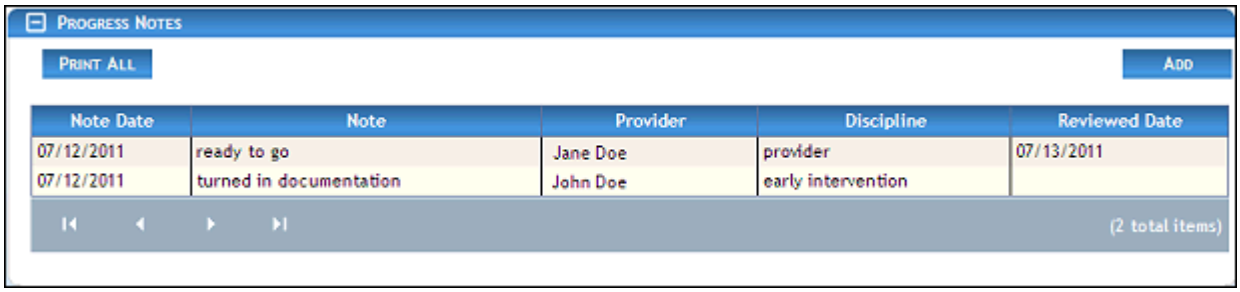
NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to your browser's help system.

Progress Notes

This page allows you to view the details of all progress notes currently recorded for a child.

To access this page, complete the following steps:
On the Child Detail page:

- On the **Child Detail** menu, select the **Services** menu option. A sub-menu displays.
- Select the **Progress Notes** sub-menu option.



Progress Notes page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

Managing Progress Notes

You can view detailed progress notes on this page as necessary.

See the following topic(s) for more information:

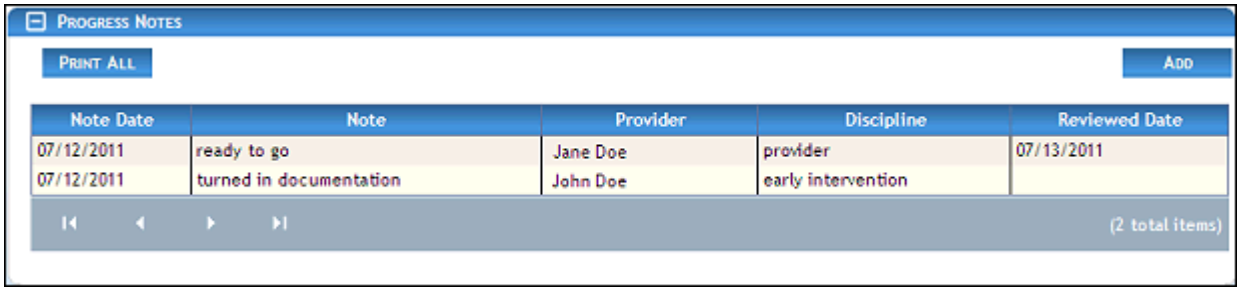
- Tutorial: Add a Daily Progress Note for a Child
- Tutorial: View or Print a List of Progress Notes for a Child
- Tutorial: View or Print a Progress Note for a Child
- Tutorial: View or Update a Progress Note for a Child

Tutorial: Add a Daily Progress Note for a Child

Use this tutorial to add a daily a progress note for a child on the Progress Notes page.

Complete the following steps to perform this tutorial:

1. Display the Progress Notes page.

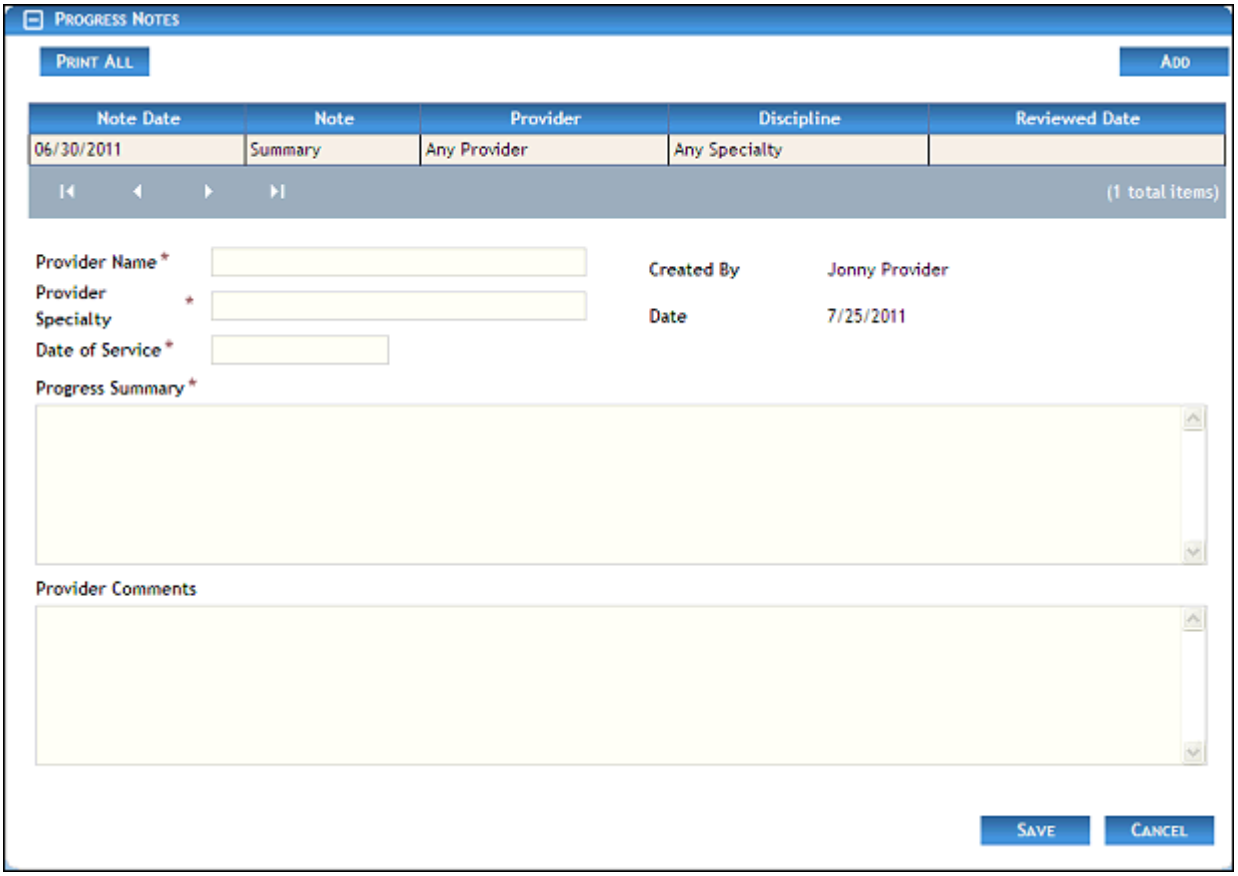


Progress Notes page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Click the **Add Daily** button. The page refreshes and displays detailed information below the table.



Progress Notes page (add daily view)

3. Complete the following information as necessary:
    - In **Provider Name**, enter the name of the service provider. At least two characters must be entered, and you can enter up to 100 characters as necessary.
    - In **Provider Specialty**, enter the specialty of the provider. At least two characters must be added, and you can enter up to 40 characters as necessary.
    - In **Service Date**, enter the month, day, and year on which the service was administered. For more information about entering dates, see the Calendar Controls topic.
    - **Created By** displays the first and last name of the person who created the note.
    - **Date** displays the date on which the note was created.
    - In **Progress Summary**, enter the provider's summary of the child's progress. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.
    - In **Provider Comments**, enter additional notes or details. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.
    - In **Reviewed Date**, enter the month, day, and year on which the review occurred. For more information about entering dates, see the Calendar Controls topic.

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page after saving the data.

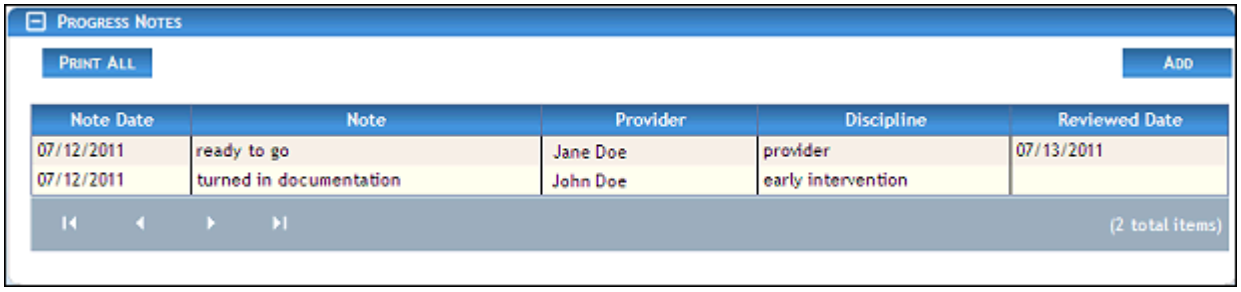
4. Click the **Save** button. The page refreshes and displays the new information in the table.

Tutorial: View or Print a List of Progress Notes for a Child

Use this tutorial to view or print a list of all progress notes that have been recorded for a child on the Progress Notes page.

Complete the following steps to perform this tutorial:

1. Display the Progress Notes page.



Progress Notes page (default view)

2. View the list of progress notes in the table.

   The table contains a list of all progress notes for the child. Detailed information about the progress notes displays in the following columns of the table:

   - **Note Date** displays the date on which the note was recorded.
   - **Note** displays the first 50 characters of the note.
   - **Provider Name** displays the name of the service provider.
   - **Discipline** displays the service provider's discipline or specialty.
   - **Reviewed Date** displays the date of the review.

   The data in these columns of the table is read-only.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

3. Click the **Print All** button to generate a report containing all of the progress notes that currently exist for the child in PDF format.

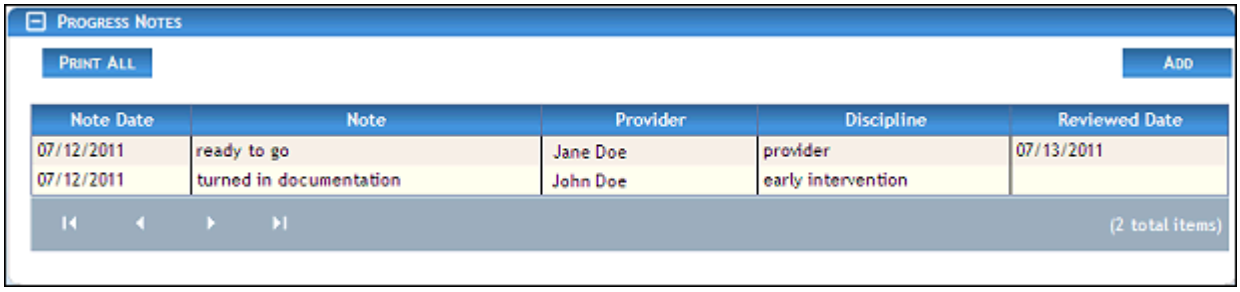
NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to your browser's help system.

Tutorial: View or Print a Progress Note for a Child

Use this tutorial to view the details of a progress note on the Progress Notes page.

Complete the following steps to perform this tutorial:

1. Display the Progress Notes page.



Progress Notes page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a progress note in the table. The page refreshes and displays detailed information below the table.

Progress Notes page (details view)

3. View the progress note details.
   - **Provider Name** displays the name of the service provider.
   - **Provider Specialty** displays the person's specialty.

- **Service Date** displays the date on which the service was provided.
- **Created By** displays the first and last name of the person who created the note.
- **Date** displays the date on which the note was created.
- **Progress Summary** displays the provider's summary of the child's progress.
- **Provider Comments** displays the provider's additional notes of comments.
- **Reviewed Date** displays the date of the review.

4. Click **Print** to view and/or print a report in PDF format.

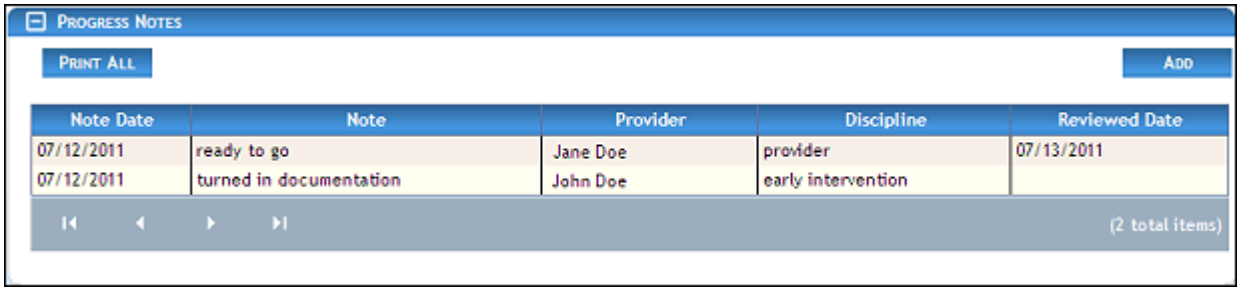
NOTE: The PDF displays in a new browser window. You can print the PDF on a printer by using your browser's print functionality. For more information, refer to your browser's help system.

Tutorial: View or Update a Progress Note for a Child

Use this tutorial to view or update a progress note for a child on the Progress Notes page.

Complete the following steps to perform this tutorial:

1. Display the Progress Notes page.



Progress Notes page (default view)

NOTE: Depending on the method of access and your current permissions, the page displays differently and some information may be disabled or unavailable.

If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

2. Double-click on a progress note in the table. The page refreshes and displays detailed information below the table.

Progress Notes page (details view)

3. View or update the progress note details as necessary.
   - In **Provider Name**, enter the name of the service provider. At least two characters must be entered, and you can enter up to 100 characters as necessary.

- In **Provider Specialty**, enter the specialty of the provider. At least two characters must be added, and you can enter up to 40 characters as necessary.
- **Created By** displays the first and last name of the person who created the note.
- **Date** displays the date on which the note was created.
- In **Service Date**, enter the month, day, and year on which the service was administered. For more information about entering dates, see the Calendar Controls topic.
- In **Progress Summary**, enter the provider's summary of the child's progress. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.
- In **Provider Comments**, enter additional notes or details. At least 1 character must be entered, and up to 1000 characters can be entered as necessary.
- In **Reviewed Date**, enter the month, day, and year on which the review occurred. For more information about entering dates, see the Calendar Controls topic.

4. Click the **Save** button. The page refreshes and displays the new information in the table.

Referrals

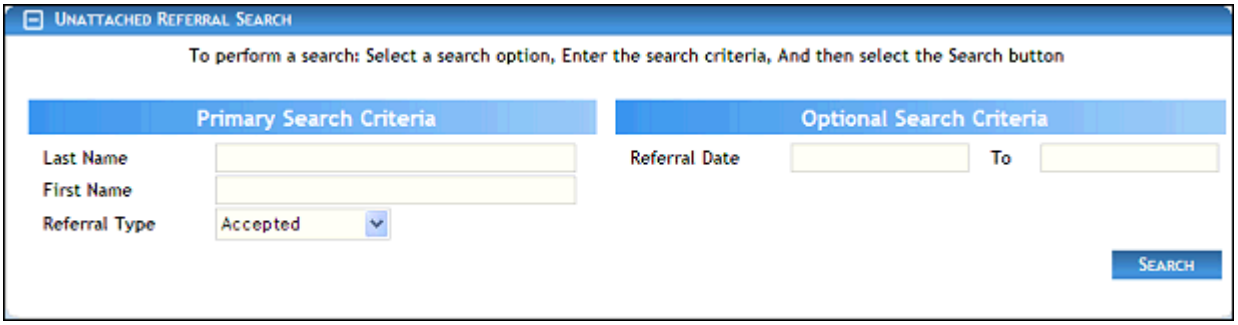
Unattached Referrals

Unattached Referrals

This page allows you to enter information such as a child's name, referral type, and/or referral date to search for referrals that are not currently attached to a child record and attach an unattached referral to a child record.

To access this page, complete the following steps:

- On the **Child Care Management** menu, select the **Unattached Referrals** menu option.



Unattached Referrals page (default view)

Searching for Unattached Referrals

You can enter information in one or more of the fields on this page to search for unattached referrals.

See the following topic(s) for more information:

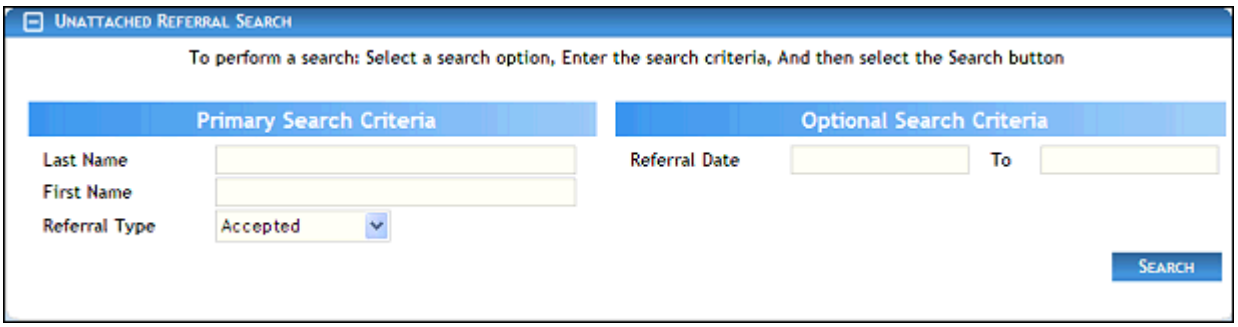
- Tutorial: Search for Unattached Referrals and Attach an Unattached Referral to a Child Record

Tutorial: Search for Unattached Referrals and Attach an Unattached Referral to a Child Record

Use this tutorial to enter information such as a child's name, referral type, and/or referral date to search for referrals that are not currently attached to a child record and attach an unattached referral to a child record on the Unattached Referrals page.

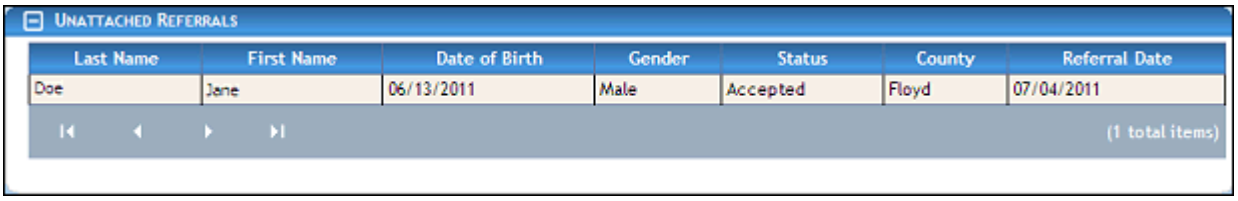
Complete the following steps to perform this tutorial:

1. Display the Unattached Referrals page.



Unattached Referrals page (default view)

2. Complete information in one or more of the following fields to perform a search:
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **Referral Type**, select the type of referral on which to search from the drop-down list.
   - In **Referral Date**, enter the beginning and ending dates of the date range on which to search. For more information about entering dates, see the Calendar Controls topic.
3. Click **Search**. The page refreshes and results found to match the search criteria display in the results table.



Unattached Referrals page (results found)

When **Search** is clicked, results found to match the search criteria specified are displayed in the following column(s) of the table:

- **Last Name** displays the person's last name.
- **First Name** displays the person's first name.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.

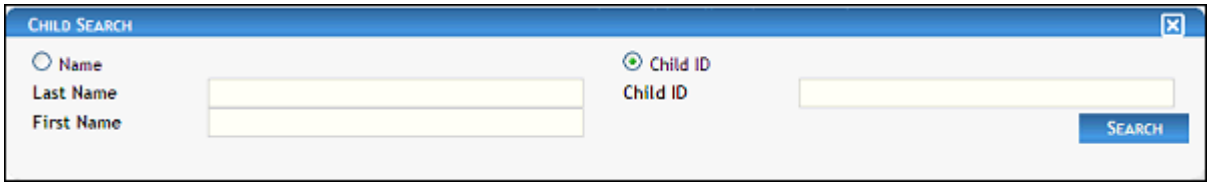
- **Gender** displays the person's sex.
- **Status** indicates whether the individual is currently active or inactive.
- **County** displays the name of the county in which the person resides (or practices).
- **Referral Date** displays the date on which the referral was first viewed at the EI location.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

4. Double-click on an unattached referral in the **Unattached Referrals** table. The page refreshes and displays the **Attach Child Referral** section below the table.

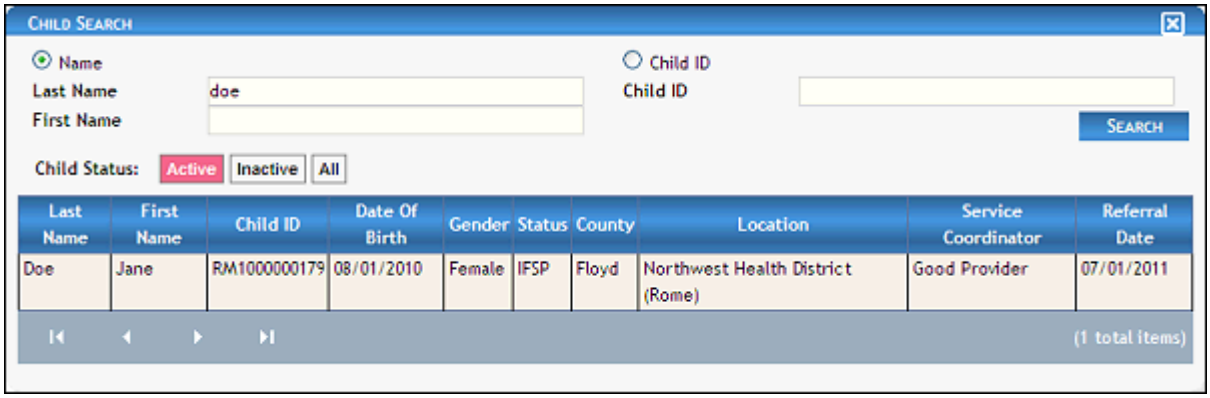
Unattached Referrals page (attach child referral view)

5. In the **Attach Child Referral** section, click the **Child ID** link to search for and select the specific child for which to attach the unattached referral. The Child Search page displays when clicked.



Child Search page (default popup view)

6. Complete information in one or more of the following fields to perform a search by child:
   - In **Last Name**, enter the last name of the person on which to search. You can enter partial information to widen your search. At least two characters must be entered, and you can enter up to 40 characters as necessary. The **Last Name** is required when searching by name.
   - In **First Name**, enter the first name of the person on which to search. You can enter partial information to widen your search. This is an optional field. You can enter up to 25 characters as necessary.
   - In **Child ID**, enter the unique identification number of the child on which to search. The complete nine-digit child identification number is required to perform a search on child ID.
7. Click **Search**. The page refreshes and results found to match the search criteria display in the **Children** table.



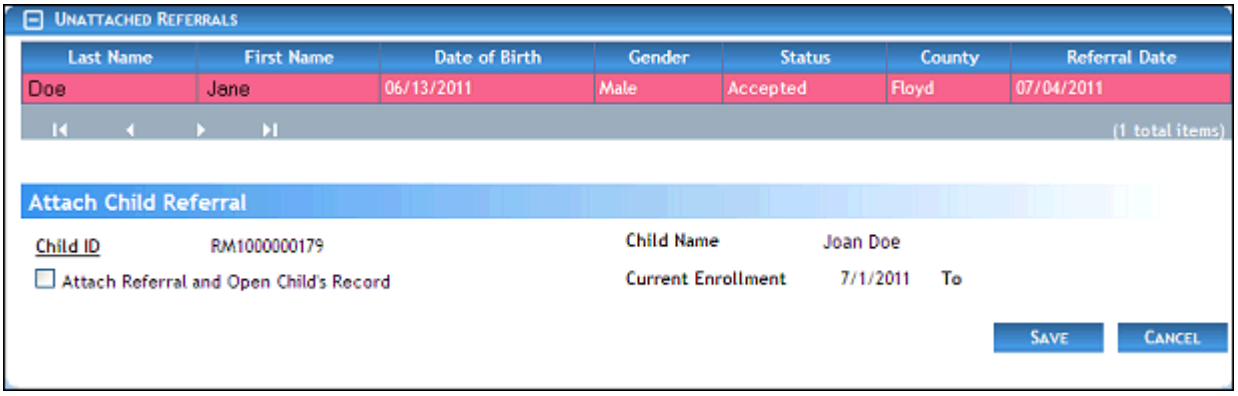
Child Search page (results found popup view)

When **Search** is clicked, results found to match the search criteria specified are displayed in the following column(s) of the table:

- **Last Name** displays the person's last name.
- **First Name** displays the person's first name.
- **Child ID** displays the child's unique identification number.
- **Date of Birth (DOB)** displays the month, day, and year on which the person was born.
- **Gender** displays the person's sex.
- **Status** indicates whether the individual is currently active or inactive.
- **County** displays the name of the county in which the person resides (or practices).
- **Location** displays the name of the District location.
- **Service Coordinator** displays the service coordinator's first and last name.
- **Referral Date** displays the date on which the referral was first viewed at the EI location.

NOTE: If no results are found, the table displays a single row containing the text: "No Records Found". For more information about tables, see the Tables topic.

8. Double-click on a child in the **Children** table to select the child. The Unattached Referrals page refreshes and displays the selected child's details in the **Attach Child Referral** section below the table.



Unattached Referrals page (child selected)

9. View or update the following information as necessary to attach the child referral.

- **Child ID** displays the child's unique identification number.
- **Child Name** displays the child's first and last name.
- **Current Activation** displays the beginning and ending dates of the child's current Activation Period.
- Select the **Attach Referral and Open Child's Record** check box to attach the unattached referral to the selected child's record and open the Child Detail page when **Save** is clicked.

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page after saving the data.

10. Click the **Save** button. If the **Attach Referral and Open Child's Record** check box is checked, the unattached referral is attached to the selected child's record and the Child Detail page displays.

User Options

Change Password

Change Password

Use this page to change your user password information.

To access this page, complete the following steps:
On the main menu bar:

- On the **User Options** menu, select the **Change Password** menu option.

Change Password
Please enter and confirm your new password. Passwords must be 7 to 10 characters long and contain at least 1 upper case, 1 lower case and 1 numeric. To exit this page without changing your password, select the back button.
Current Password *
New Password *
Confirm New Password *
Reset
Back
Submit

Change Password page (default view)

Changing Your Password

Use this page to change your password information.

See the following topic(s) for more information:

- Tutorial: Change User Password Information

Tutorial: Change User Password Information

Use this tutorial to change your user password information.

Complete the following steps to perform this tutorial:

1. Display the Change Password page.

Change Password
Please enter and confirm your new password. Passwords must be 7 to 10 characters long and contain at least 1 upper case, 1 lower case and 1 numeric. To exit this page without changing your password, select the back button.
Current Password *
New Password *
Confirm New Password *
Reset
Back
Submit

Change Password page (default view)

2. Enter the new password information.
   - In **Current Password**, enter the password you currently use to sign on to the application.
   - In **New Password**, enter your new password. Passwords must be 7 to 10 characters long and must contain at least 1 upper case character, 1 lower case character, and 1 numeric character.
   - In **Confirm New Password**, enter your new password again for confirmation purposes.

NOTE: Asterisks (*) indicate which fields are required on the page. If required information is missing, an error message displays at the top of the page after saving the data.

3. Click **Submit**. A confirmation message displays at the top of the page and the Change Password page is closed. However, if the password was not changed successfully, the Change Password page is still displayed.

Glossary

6

6-Month Review Meeting Type: A 6-Month Review of the IFSP is required six months after the Initial meeting as well as six months after each Annual meeting. The 6-Month Review meeting must be scheduled and finalized before the next Annual meeting may be scheduled. The 6-Month Review meeting must be held during a current IFSP period. During the 6-Month Review meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

A

Annual Meeting Type: Every 365 days, the IFSP needs to be reviewed by adding an Annual meeting. Annual meetings can only be scheduled after the Initial and 6-Month Review meetings have been finalized. The IFSP specifications for the next IFSP period are established during the Annual meeting and determined by the IFSP type.

B

Billing Entity: Payee-specific information based on the tax ID of the payee.

Billing Entity Agreements: Payee-specific agreements required for enrollment with the CFO.

Billing Entity Provider: A provider accounts that uses the billing entity's tax ID number. All payments for these provider accounts are paid to this billing entity.

Billing Entity Sites: Sites or locations enrolled with the CFO under the billing entity's Tax ID number.

C

Canceled Meeting Status: The meeting status of Canceled is only used for those meetings that are not going to be held and have a current status of Scheduled.

CCM: CCM is an acronym for the Child Care Management application.

CFO: A Central Finance Office.

Check Box: A check box is a control that enables the user to enable or disable one or more features or options. A check box appears as a small box (or square). When an option is enabled, a check mark (or an X) appears in the box. Clearing a check box disables an option. A check box can be selected or cleared by clicking on it with the pointer.

Claim Check: A check performed on a claim for correction before the claim is actually submitted to the CFO database.

Control: In a graphical user interface, a control is an object on the screen that can be manipulated by the user to perform an action. The most common controls are buttons, which allow the user to select options, and scroll bars, which allow the user to move through a document or position text in a window. Controls such as check boxes, drop-down lists, list boxes, radio buttons, tables, and text boxes are also referred to as fields within the content of this help system.

D

Default: A default is the selection, value, or text that the application automatically makes or places in a field when you display a screen. Defaults are used to help you complete a screen more quickly. For instance, many date fields default to today's date so that you do not have to type it on every screen. You can change a field from its default if necessary.

Drop-down List: A drop-down list is a control that enables the user to choose one option from a list of possibilities. A drop-down list appears as a box, displaying the currently selected option, next to a button marked with a down-arrow. When the user clicks on the button, a list appears. The list has a scroll bar if the list contains more options than can be displayed at once. The user can select an option from the list by clicking on it with the pointer.

E

Early Intervention (EI): This is a term which in general means identifying and effecting treatment for a problem as early as possible. Educationally it means that children with disabilities or handicapping conditions of some sort are identified at an early age and actions are taken to help these children as soon as identification occurs. Early intervention can range from prescribing glasses for a two year old (years before the child needs to use the glasses for school work) to developing a daily physical therapy program for a three month old child with cerebral palsy so the child does not begin to lose the potential use of his arms and legs as muscles develop unevenly. In an educational setting, early intervention can mean offering special education to children as soon as the child is diagnosed. These programs offer a high staff ratio with specialists trained in a variety of areas ranging from special education to speech and physical therapy. (See terms for definitions.) They often include components to train parents through parent seminars and self-help groups to build on the work done in the school. In cases where the children have physical handicaps or serious health problems, the programs frequently tie in with hospitals or health centers whose professionals work with the teaching staff to minimize the physical limitations of students while maximizing their growth potential.

EI: See definition for Early Intervention (EI).

Email notifications: Notifications that are sent to a specified email address for a provider account or billing entity. If an email notification is selected and a corresponding email address exists, an email notification is sent to the specified email address.

ERISA: ERISA is the Employee Retirement Income Security Act of 1974, or a Federal law that establishes legal guidelines for private pension plan administration and investment practices. ERISA is a major U.S. law that guarantees certain categories of employees a pension provided by their employer after a certain period of employment.

F

Field: A field is a control that allows a user input, select, or view information. Within the content of this help system, any of the following types of controls may be referred to as a field: a check box, a drop-down list, a list box, a radio button, a table, or a text box.

Filter: A filter is a tool used to control the results displayed when a search is performed. Filtering search results prevents the application from working overtime and speeds the search process. For example, on some web pages, you can enter filter criteria to narrow a search, and display a shortened list of search results -- or maybe the exact result for which you are searching.

H

Help Desk: The help desk is a part of the Covansys team. The individuals who make up the help desk team know a lot about the application and can help solve problems you may encounter when working with the application. When taking an action that may affect other workstations or servers and databases other than your own, you are directed by the application to contact the Help Desk in order to complete the action properly.

Hypertext Link: A hypertext link (or link) is text that can be clicked with a pointer to display a different web page or a passage of related text within the current web page. Hypertext links within the help system display as bright blue, underlined text.

I

Icon: An icon is a graphic representation of an object that a user can click or double-click to open, such as a disk drive, document, folder, program, or shortcut.

IFSP: See definition for Individualized Family Service Plan (IFSP).

Individualized Family Service Plan (IFSP): A written plan describing the infant's current level of development; the family's strengths and needs related to enhancement of the infant's or toddler's development; goals for the infant and the other family members (as applicable), including the criteria, procedures, and time lines used to evaluate progress (the IFSP should be evaluated and adjusted at least once a year and reviewed at least every six months); and the specific early intervention services needed to meet the goals (including the frequency and intensity and method of delivering services, the projected date of initiating services, and the anticipated duration of services). The IFSP is developed and implemented by the child's parents and a multi-disciplinary early intervention team. An assigned person, also known as a service coordinator, generally initiates an IFSP and works with the family to complete it as the child grows to preschool age.

Initial Meeting Type: The Initial meeting is required for each child in the program and is used to plan the IFSP for the child and family. The Initial meeting is a required meeting for each enrollment period. The very first meeting that can be scheduled must be an Initial or Interim meeting. An Annual, Inter-periodic, or 6-Month Review meeting cannot be scheduled if the Initial meeting has not been finalized. IFSP specifications are established during the Initial meeting and determined by the IFSP type.

Inter-periodic Meeting Type: A parent or other team member may call a team meeting at anytime. When this occurs, an Inter-periodic meeting needs to be created. Inter-periodic meetings are held at any time during an IFSP period. During the Inter-periodic meeting, the IFSP specifications for the current IFSP period cannot be changed, but IFSP data may be updated and service authorizations can be added.

Interim Meeting Type: The Interim meeting type is designed only for those children who require immediate Early Intervention services prior to the Initial meeting. The Interim meeting can only be held one time and it must be the very first meeting on a child's enrollment period. The very first meeting that can be scheduled must be an Interim or Initial meeting.

L

Lapsed IFSP: If a meeting cannot be held due to scheduling requirements causing a gap in the services that can be delivered to a child; the Case Administrator may create a Lapsed IFSP to cover these services for a maximum of 45-days until the meeting can be held. A Lapsed IFSP does not require a meeting be scheduled; because the Case Administrator uses the Location Administration menu option on the Child Care Management menu to create a Lapsed IFSP automatically. New service authorizations may not be created for a Lapsed IFSP. Instead, only those authorizations that existed from the previous IFSP period may be "continued" for the duration of the Lapsed IFSP period. A Lapsed IFSP cannot be created if a current IFSP exists on the child's record. Two Lapsed IFSP meetings cannot be created back to back. A Lapsed IFSP cannot be the first meeting created on a child's record.

Link: A link (or hypertext link) is text that can be clicked with a pointer to display a different web page or a passage of related text within the current web page. Hypertext links within the help system display as bright blue, underlined text.

List Box: A list box is a control that allows you to choose one or more options from a list of many possibilities. A list box appears as a box (or rectangle), displaying a list of available options. The list has a scroll bar if the list contains more options than can be displayed at once. Click on an option in the list to select (or clear)

it. Multiple options may be selected by pressing and holding down the Shift key and clicking additional options. The information displayed in a list box is read-only and cannot be changed.

M

Menu Bar: A rectangular bar displayed in an application screen, often at the top, from which menus can be selected by the user. Names of available menus are displayed in the menu bar; choosing one with the keyboard or with a pointer causes the list of options in that menu to be displayed.

Menu Option: A choice on a menu, selectable by either the keyboard or a pointer. In some instances, a menu option that is not available is "grayed" (dimmed in comparison to the valid menu choices).

Minimize/Maximize: Minimizing a screen is a quick way to make a screen as small as possible, or to reduce the screen to its representative icon (or button) on the Windows Taskbar. Maximizing a screen is a quick way to enlarge a screen to the maximum allowable size (depending on your current monitor resolution settings). Screens can be maximized to the full size of your monitor's display area.

N

Neonatal Intensive Care Unit (NICU): An intensive care unit designed with special equipment to care for premature, low birth-weight, or seriously ill newborn children.

NICU: See definition for Neonatal Intensive Care Unit (NICU).

O

Ongoing Meeting Status: The meeting status is updated from Scheduled to Ongoing when the meeting date is the same as or prior to the current date. The status remains at Scheduled until the first meeting attendance record is updated and saved to the system. Once a meeting is Ongoing it cannot be Canceled or Rescheduled. A meeting will remain in Ongoing status until it is finalized.

P

PAM: PAM is an acronym for the Provider Account Management application.

Provider Account Agreements: Agreements required between the provider and the CFO for the enrollment of the provider account.

Provider Account Sites: Sites or locations used by the provider account.

Pull-down Menu: A pull-down menu is a menu that is accessed using the menu bar on a screen in the application. Pull-down menus provide additional methods of navigation within the application. Each menu contains a list of menu options that can be selected to perform various actions.

R

Radio Button: A radio button is a control that enables the user to choose from a group of mutually exclusive options. A radio button appears as a small circle and is always grouped with one or more other radio buttons. When a radio button is selected, a smaller, filled circle appears inside it. A radio button can be selected by clicking on it with a pointer. Selecting one radio button in a group clears the previously selected radio button, so that only one option in a group can be selected at a time.

Read-only Information: Read-only information is information that can be retrieved, viewed, or printed, but it cannot be updated, altered, or changed in any way.

Required Information: Required information is information that is required by the application before you can proceed. Required information must be entered (or selected) to continue the current process beyond the current web page.

Rescheduled Meeting Status: The Reschedule option is available if the meeting status is Scheduled and the meeting date or primary meeting type must be changed. If the primary meeting type or meeting date needs to be adjusted, the meeting can be Rescheduled. A Rescheduled meeting is saved as a new meeting with a status of Tentative. The originating meeting may not be updated once it has been Rescheduled.

S

Scheduled Meeting Status: A meeting can be Scheduled if no other meeting has a status of Scheduled or Ongoing and the meeting date is within 30 days in the future of the current date. If the meeting date is more than 30 days in the future, the meeting status will remain at Tentative. A meeting date in the past may be scheduled if it does not exceed 60 days as of the current date and does not supersede any other business rules (like an Annual meeting being held prior to the Initial meeting). Once a meeting is Scheduled, it may not be deleted.

Screen: A screen is the currently active window or dialog box displayed on your workstation or server. Alternately, the word "screen" may be used to refer to the display area of a monitor.

Site Detail: A detailed listing of site-specific information.

Specialty List: A list of specialties for a provider account. To make changes to the specialties associated with a provider account, the provider must contact the CFO.

Sub-tab: A sub-tab is a tabbed page within another tabbed page (see Tab). Sub-tabs usually display on the right-hand side of your screen. A label (the title or name of the sub-tab) is displayed on the sub-tab. You can click on a sub-tab to display the information available on the sub-tab.

System Tray: The System Tray is the area located at the bottom right-hand side of your Windows Taskbar. It contains the system clock and shortcuts to specific Windows tools that automatically start when Windows opens, like the Volume control.

T

Tab: A tab is a tabbed page on a screen that has a label. A tab usually displays on the upper edge of the screen with a cut away section giving the visual effect of multiple tab cards that are stacked against each other. A label (the title or name of the tab) is displayed on the tab. You can click on a tab to display the information available on the tab.

Table: A table is a grid control that displays separate entries of information in a table, index, or spreadsheet format. A table contains a block of text or data that is formatted in aligned rows and columns. Some tables allow you to enter information directly into the cells of the table, while other tables contain read-only information that cannot be changed.

Tentative Meeting Status: Meeting status of Tentative is given to all meetings when first created and saved. To schedule a meeting, the meeting status must be Tentative. Only meetings with a status of Tentative may be deleted on the Team Meeting Planner page. Tentative meeting information can be updated at any time.

Text Box: A text box is a control that enables the user to type (or enter) text. A text box appears as a rectangle. Some text boxes allow you to enter only numeric digits, and most are limited to a maximum number of characters.

Toolbar: A toolbar is a row of toolbar buttons or icons that normally displays at the top of a screen beneath the menu bar. When you click on one of the options in the toolbar, a specific function in the application is activated.

Toolbar Button: A toolbar button is a command button in the toolbar on a screen that performs a specific function.

Tree List: A tree list is a list of information that can be expanded or collapsed by clicking on a plus sign or a minus sign. Information displayed in a tree list is generally read-only information.

Tutorial Topics: Tutorial help topics contain direct, step-by-step instructions that you can use while learning how to perform specific tasks within the application. Tutorial help topics show you the quickest, easiest method for completing a particular application task. They contain the steps required to complete a task.

W

Windows Desktop: The Windows Desktop is the large area you see on your screen when Windows starts. The Start button and the Windows Taskbar are available on the Windows Desktop. You can customize the Windows Desktop by adding shortcuts to your favorite programs.

Windows Taskbar: The Windows Taskbar is the bar at the bottom of the Windows Desktop that contains the Start button, the System Tray, and a shortcut icon (or button) for each program that is currently open. The Windows Taskbar can be used to switch from one application to another. When applications are minimized to the Windows Taskbar, simply click on the representative icon (or button) displayed on the Windows Taskbar to restore the applications to their previously displayed state.